

EXHIBIT 2

Part 18



User Name: T8PVBDU

Date and Time: Tuesday, October 23, 2018 4:05:00 PM EDT

Job Number: 76113250

Documents (50)

1. Snyder's-Lance, Inc. to Release First Quarter 2013 Results on Tuesday, May 7th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, May 7th.

Client/Matter: 23756-1001

Search Terms: "pretzel crisps" or "pretzel crisp" or pretzelcrisp

Search Type: Terms and Connectors

Narrowed by:

Content Type	Narrowed by
News	Timeline: Apr 21, 2012 to Dec 31, 2018

2. Snyder's-Lance, Inc. to Release First Quarter 2013 Results on Tuesday, May 7th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, May 7th.

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Content Type	Narrowed by
News	Timeline: Apr 21, 2012 to Dec 31, 2018

3. Lance introduces new snacks in US

Client/Matter: 23756-1001

Search Terms: "pretzel crisps" or "pretzel crisp" or pretzelcrisp

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Content Type	Narrowed by
News	Timeline: Apr 21, 2012 to Dec 31, 2018

4. US: Snyder's-Lance launches sandwich cracker NPD.

Client/Matter: 23756-1001

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News	Timeline: Apr 21, 2012 to Dec 31, 2018

5. Lance® Gives Consumers More Products To Love In 2013

Client/Matter: 23756-1001

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News	Timeline: Apr 21, 2012 to Dec 31, 2018

6. Lance;R Gives Consumers More Products To Love In 2013.

Client/Matter: 23756-1001

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News	Timeline: Apr 21, 2012 to Dec 31, 2018

7. Lance[R] Gives Consumers More Products To Love In 2013.

Client/Matter: 23756-1001

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8. A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories;The State of the Industry ALMANAC 2013;Industry overview

Client/Matter: 23756-1001

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9. A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the Industry ALMANAC 2013)(Industry overview)

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10. Lance[R] Sandwich Crackers Is Giving You 100 Days To Win \$100,000.

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News	Timeline: Apr 21, 2012 to Dec 31, 2018

11. Lance;R Sandwich Crackers Is Giving You 100 Days To Win \$100,000.

Client/Matter: 23756-1001

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Timeline: Apr 21, 2012 to Dec 31, 2018

12. Lance® Sandwich Crackers Is Giving You 100 Days To Win \$100,000

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Timeline: Apr 21, 2012 to Dec 31, 2018

13. Lance Brand 'Relaunches' For 100th Anniversary

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Timeline: Apr 21, 2012 to Dec 31, 2018

14. Classic Cape Cod® Flavor with 40% Less Fat

Client/Matter: 23756-1001

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15. Classic Cape Cod;R Flavor with 40% Less Fat.

Client/Matter: 23756-1001

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Timeline: Apr 21, 2012 to Dec 31, 2018

16. VMG Partners Announces Promotion of Wayne Wu To Principal

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Timeline: Apr 21, 2012 to Dec 31, 2018

17. BLOG: Stylize: Gilt City Boston Warehouse Sale: It's Back

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18. Snyder's-Lance to close bakery in Canada

Client/Matter: 23756-1001

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19. US: Snyder's-Lance to shutter Ontario plant.

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20. Snyder's-Lance Announces Plant Closing - Cambridge, Ontario

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21. Snyder's-Lance Announces Plant Closing - Cambridge, Ontario.

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Timeline: Apr 21, 2012 to Dec 31, 2018

22. Snyder's-Lance, Inc. Announces Webcast of Investor Presentation on Tuesday, February 26th at 8:45 am Eastern

Client/Matter: 23756-1001

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23. Snyder's-Lance, Inc. Announces Webcast of Investor Presentation on Tuesday, February 26th at 8:45 am Eastern.

Client/Matter: 23756-1001

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24. Snyder's-Lance Q4 net income decreases

Client/Matter: 23756-1001

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25. Snyder's-Lance Posts Full Year 2012 Results

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Timeline: Apr 21, 2012 to Dec 31, 2018

26. Snyder's-Lance Posts Full Year 2012 Results;Financial report

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27. Snyder's-Lance kicks off 100-year celebration

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28. America's Favorite Sandwich Cracker Celebrates 100 Years

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29. Snyder's-Lance Reports Full Year 2012 Results

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30. Snyder's-Lance Reports Full Year 2012 Results;Financial report

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31. Snyder's-Lance posts 65.3% decline in Q4 net earnings

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32. US: Snyder's-Lance 2013 outlook below Wall St estimates.

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33. Snyder's-Lance fiscal 2012 net income up 54.4%

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34. The Supply Side: Wal-Mart Supplier News Briefs

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35. Q4 2012 Lance, Inc. Earnings Conference Call - Final

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36. Event Brief of Q4 2012 Lance, Inc. Earnings Conference Call - Final

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37. Snyder's-Lance, Inc. Reports Results for Full Year 2012.

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38. Snyder's-Lance, Inc. Reports Results for Full Year 2012;-- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

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39. Snyder's-Lance reports slight earnings decrease in 2012

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News	Timeline: Apr 21, 2012 to Dec 31, 2018

40. Lance Earnings: Here's Why Investors are Not Excited Now

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Timeline: Apr 21, 2012 to Dec 31, 2018

41. Snyder's-Lance income takes 4Q hit, still up for the year

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42. Snyder's-Lance Q4 Profit Incl. Special Items Decreases - Quick Facts

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43. Super savings for Super Bowl Parties

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44. STELLAR CELEBRATION;The more fun, the more money Tradition continues at the 13th annual Naples Winter Wine Festival

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Timeline: Apr 21, 2012 to Dec 31, 2018

45. Whole Planet Foundation and Partners to Host (Unofficial) Pre-Grammy Benefit at Historic East West Studios

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46. Global Snack Foods Industry

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News

Narrowed by
Timeline: Apr 21, 2012 to Dec 31, 2018

47. Snyder's-Lance, Inc. to Release Fourth Quarter 2012 Results on Tuesday, February 12th Before Market

Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, February 12th.

Client/Matter: 23756-1001

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48. Snyder's-Lance, Inc. to Release Fourth Quarter 2012 Results on Tuesday, February 12th Before Market

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Timeline: Apr 21, 2012 to Dec 31, 2018

49. Spice Up Your Big Game Party with Cabot Creamery's Bold amp; Tasty 'Superb Bowl' Recipes

Client/Matter: 23756-1001

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Timeline: Apr 21, 2012 to Dec 31, 2018

50. Spice Up Your Big Game Party With Cabot® Creamery's Bold & Tasty 'Superb Bowl' Recipes;'Get Pinning

to Win!" for The Big Game with Cabot Cheese and Pinterest

Client/Matter: 23756-1001

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Timeline: Apr 21, 2012 to Dec 31, 2018



Snyder's-Lance, Inc. to Release First Quarter 2013 Results on Tuesday, May 7th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, May 7th.

Benzinga.com

April 18, 2013

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ASAP
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Length: 407 words

Body

Byline: Newswire

CHARLOTTE, N.C., April 18, 2013 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that it intends to release its 2013 first quarter results before the market opens on Tuesday, May 7th, 2013. Management will also conduct a conference call and live webcast at 9:00 am Eastern time on Tuesday, May 7th, 2013 to review the Company's results. Participating in the conference call will be Carl Lee, Jr, incoming CEO, President and Chief Operating Officer; Rick Puckett, Executive Vice President and Chief Financial Officer and Mark Carter, Vice President and Investor Relations Officer.

(Logo: <http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website, www.snyderslance.com. In addition, the slide presentation will be available to download and print approximately 30 minutes before the webcast at www.snyderslance.com.

To participate in the conference call, the dial-in number is (866)814-7293 for U.S. callers or (702) 696-4943 for international callers. A continuous telephone replay of the call will be available between 1:00pm on May 7th and midnight on May 14th. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 44012629. Investors may also access a web-based replay of the conference call at www.snyderslance.com.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover(R), Lance(R), Cape Cod(R), **Pretzel Crisps(R)**, Krunchers!(R), Tom's(R), Archway(R), Jays(R), Stella D'oro(R), Eatsmart(R), O-Ke-Doke(R), Grande(R) and Padrinos(R) brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

SOURCE Snyder's-Lance, Inc.

[Graphic omitted]

Snyder's-Lance, Inc. to Release First Quarter 2013 Results on Tuesday, May 7th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on T....

Load-Date: April 19, 2013

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Snyder's-Lance, Inc. to Release First Quarter 2013 Results on Tuesday, May 7th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, May 7th.

PR Newswire

April 18, 2013 Thursday 11:00 AM EST

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Length: 414 words

Dateline: CHARLOTTE, N.C., April 18, 2013

Body

Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that it intends to release its 2013 first quarter results before the market opens on Tuesday, May 7th, 2013. Management will also conduct a conference call and live webcast at 9:00 am Eastern time on Tuesday, May 7th, 2013 to review the Company's results. Participating in the conference call will be Carl Lee, Jr, incoming CEO, President and Chief Operating Officer; Rick Puckett, Executive Vice President and Chief Financial Officer and Mark Carter, Vice President and Investor Relations Officer.

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About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, Pretzel Crisps®, Krunchers!®, Tom's®, Archway®, Jays®, Stella D'oro®, Eatsmart®, O-Ke-Doke®, Grande® and Padrinos® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

SOURCE Snyder's-Lance, Inc.

CONTACT: Mark Carter, Investor Relations Officer (704) 557-8386, Joe Calabrese, Financial Relations Board (212) 827-3772

Snyder's-Lance, Inc. to Release First Quarter 2013 Results on Tuesday, May 7th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on

Load-Date: April 19, 2013

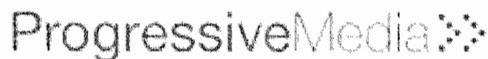
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Lance introduces new snacks in US

Progressive Media - Company News

April 17, 2013 Wednesday

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Section: QUICK SERVICE RESTAURANT & FAST FOOD; Savory Snacks

Length: 196 words

Highlight: Lance, a brand owned by US-based Snyder's-Lance, has introduced new Xtra Fulls Toastchee and Xtra Fulls Toasty as well as product extensions for its Cracker Creations, Captain's Wafers sandwich crackers and Nekot Sandwich cookies.

Body

Lance Xtra Fulls are sandwich cracker varieties, which are made with real, whip-churned peanut butter. The products offer up to 6 grams of protein per serving.

In addition, the company has introduced Lance Graham Cracker Creations - the are all-natural, premium sandwich crackers made with crunchy, slightly sweet graham wafers; Jalapeno Cheddar Captain's Wafers - add a spicy twist to the well-known line of light and flaky sandwich crackers; and Chocolate Nekot - chocolate cookie sandwiches filled with creamy peanut butter or sweet chocolate crème.

These newly launched products contain no high fructose corn syrup, no preservatives and 0 grams of trans fat.

The new products, priced at a suggested retail prices ranging from \$3.39 to \$3.59, will be available at all major retailers across the nation.

Snyder's-Lance offers pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. The company manufactures its products under various brand names, including Snyder's of Hanover, Lance, Cape Cod, **Pretzel Crisps**, Krunchers!, Tom's, Archway, Jays, Stella D'oro, Eatsmart, O-Ke-Doke, Grande and Padrinos.

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US: Snyder's-Lance launches sandwich cracker NPD.

just-food.com

April 17, 2013

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Length: 795 words

Body

Byline: Katy Askew

Snack maker Snyder's-Lance is expanding its line-up of peanut butter filled sandwich crackers this month.

The company is launching Xtra Fulls, Toastchee, and Xtra Fulls Toasty, as well as product extensions for its Cracker Creations, Captain's Wafers sandwich crackers and Nekot Sandwich cookies.

Snyder's-Lance said the swathe of product development was being announced to celebrate its 100th anniversary.

"We're confident that consumers will love our delicious new offerings, and we look forward to satisfying America's snacking appetite for another 100 years," Tom Ingram, senior brand director, bakery, said.

Press release follows:

Lance®; Gives Consumers More Products To Love In 2013

CHARLOTTE, N.C., April 16, 2013 /PRNewswire-USNewswire/ -- Delivering on its promise to give consumers "more of what they love" in 2013, Lance®; is launching new Xtra Fulls™ Toastchee®; and Xtra Fulls™ Toasty™, as well as product extensions for its Cracker Creations®, Captain's Wafers®; sandwich crackers and Nekot®; Sandwich cookies. The new products will begin shipping to major retailers nationwide this month.

(Photo: <http://photos.prnewswire.com/prnh/20130416/DC95517>)

Lance®; Xtra Fulls™, the lead items to celebrate the brand's 100th anniversary, offer more peanut butter filling for an extra satisfying snacking experience. Over the years, more peanut butter has been a top consumer request. The new sandwich cracker varieties - made with real, whip-churned peanut butter that is freshly-ground in Georgia - offer up to 6 grams of protein per serving.

"Our 100th anniversary is all about giving our fans more of what they love and delivering on the many consumers requests we've heard over the years," said Tom Ingram, Senior Brand Director, Bakery at Snyder's-Lance, Inc. "We're confident that consumers will love our delicious new offerings, and we look forward to satisfying America's snacking appetite for another 100 years."

In addition to Xtra Fulls™, consumers will be treated to several Lance®; product extensions. Lance ® Graham Cracker Creations®; with peanut butter or chocolate filling are all-natural, premium sandwich crackers made with crunchy, slightly sweet graham wafers. Bringing a zesty, new flavor to the snack aisle, Jalapeno Cheddar Captain's Wafers ® add a spicy twist to the well-known line of light and flaky sandwich crackers. Chocolate Nekot®; - an expansion of one of Lance's most popular cookies - are chocolate cookie sandwiches

US: Snyder's-Lance launches sandwich cracker NPD.

filled with creamy peanut butter or sweet chocolate crème. The new products will be available for suggested retail prices ranging from \$3.39 to \$3.59 each.

Like all Lance® snacks, the new products contain no high fructose corn syrup, no preservatives and 0 grams of trans fat. For more information about Lance® products and the brand's 100th anniversary celebrations, visit the Lance Snacks Facebook page, www.lance.com or www.Happy100Lance.com.

About Lance® Sandwich Crackers Lance® sandwich crackers and Lance® Cracker Creations® are available in nearly twenty varieties, including Toastchee®, Whole Grain, Cracker Creations® and new Xtra Fulls™. Each product is made with freshly-baked, crispy crackers, graham or granola wafers, and real peanut butter, cheese, cream cheese or chocolate filling. Lance® sandwich crackers and Lance® Cracker Creations® have 0 grams trans fat, no preservatives and no high fructose corn syrup. For more information about Lance® sandwich crackers, visit www.lance.com or the Lance Snacks Facebook page.

About Snyder's-Lance, Inc. Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover ®, Lance ®, Cape Cod ®, Pretzel Crisps ®, Krunchers! ®, Tom's ®, Archway ®, Jays ®, Stella D'oro ®, Eatsmart ®, O-Ke-Doke ®, Grande ® and Padrinos ® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

Original source: Snyder's-Lance

This article was originally published on just-food.com on 17 April 2013. For authoritative and timely food business information visit <http://www.just-food.com>.

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Lance® Gives Consumers More Products To Love In 2013

PR Newswire

April 16, 2013 Tuesday 12:18 PM EST

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Length: 616 words

Dateline: CHARLOTTE, N.C., April 16, 2013

Body

Delivering on its promise to give consumers "more of what they love" in 2013, Lance® is launching new Xtra Fulls(TM) Toastchee® and Xtra Fulls(TM) Toasty(TM), as well as product extensions for its Cracker Creations®, Captain's Wafers® sandwich crackers and Nekot® Sandwich cookies. The new products will begin shipping to major retailers nationwide this month.

(Photo: <http://photos.prnewswire.com/prnh/20130416/DC95517>)

Lance® Xtra Fulls(TM), the lead items to celebrate the brand's 100th anniversary, offer more peanut butter filling for an extra satisfying snacking experience. Over the years, more peanut butter has been a top consumer request. The new sandwich cracker varieties - made with real, whip-churned peanut butter that is freshly-ground in Georgia - offer up to 6 grams of protein per serving.

"Our 100th anniversary is all about giving our fans more of what they love and delivering on the many consumers requests we've heard over the years," said Tom Ingram, Senior Brand Director, Bakery at Snyder's-Lance, Inc. "We're confident that consumers will love our delicious new offerings, and we look forward to satisfying America's snacking appetite for another 100 years."

In addition to Xtra Fulls(TM), consumers will be treated to several Lance® product extensions. Lance® Graham Cracker Creations® with peanut butter or chocolate filling are all-natural, premium sandwich crackers made with crunchy, slightly sweet graham wafers. Bringing a zesty, new flavor to the snack aisle, Jalapeno Cheddar Captain's Wafers® add a spicy twist to the well-known line of light and flaky sandwich crackers. Chocolate Nekot® - an expansion of one of Lance's most popular cookies - are chocolate cookie sandwiches filled with creamy peanut butter or sweet chocolate crème. The new products will be available for suggested retail prices ranging from \$3.39 to \$3.59 each.

Like all Lance® snacks, the new products contain no high fructose corn syrup, no preservatives and 0 grams of trans fat. For more information about Lance® products and the brand's 100th anniversary celebrations, visit the Lance Snacks Facebook page, <http://www.lance.com> or <http://www.Happy100Lance.com>.

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SOURCE Lance® Sandwich Crackers

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April 16, 2013

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Length: 642 words

Body

Byline: Newswire

CHARLOTTE, N.C., April 16, 2013 /PRNewswire-USNewswire/ -- Delivering on its promise to give consumers "more of what they love" in 2013, Lance(R) is launching new Xtra Fulls(TM) Toastchee(R) and Xtra Fulls(TM) Toasty(TM), as well as product extensions for its Cracker Creations(R), Captain's Wafers(R) sandwich crackers and Nekot(R) Sandwich cookies. The new products will begin shipping to major retailers nationwide this month.

(Photo: <http://photos.prnewswire.com/prnh/20130416/DC95517>)

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Lance; R Gives Consumers More Products To Love In 2013.

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SOURCE Lance(R) Sandwich Crackers

[Graphic omitted]

Load-Date: April 17, 2013

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Lance[R] Gives Consumers More Products To Love In 2013.

Benzinga.com

April 16, 2013

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Byline: Newswire

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Lance[R] Gives Consumers More Products To Love In 2013.

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SOURCE Lance[R] Sandwich Crackers

[Graphic omitted]

Load-Date: April 17, 2013

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A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the Industry ALMANAC 2013; Industry overview

Grocery Headquarters

April 1, 2013

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Body

WRITTEN AND DEVELOPED BY THE GROCERY HEADQUARTERS EDITORIAL STAFF

THE SUPERMARKET INDUSTRY IS IN A BATTLE FOR ITS COLLECTIVE LIFE. A lackluster economy and higher costs are impacting industry sales and profits. Competition is increasing from virtually every angle.

[ILLUSTRATION OMITTED]

[ILLUSTRATION OMITTED]

The result has been a downturn in sales in some major categories at the food store. As our annual State of the Industry report, developed with the SymphonyIRI Group and sponsored in part by Kraft Foods, shows, many key segments posted drops in dollar and unit sales at supermarkets during the 12-month period ended Jan. 27.

High profile categories such as carbonated beverages, milk, bread and rolls and cereal showed drops in volume during the tracked period as consumers either moved on to replacement products or found other locations to purchase these items. "We don't just compete with other supermarket chains and Walmart and Target these days," says a senior executive with a West Coast chain. "Now, we have to worry about drug store chains, convenience store chains, dollar store chains, independent specialty operations and, more recently, Amazon.com and other e-commerce outlets. It is natural that they would take some business from us just by offering a sampling of products."

The \$113 billion carbonated beverage segment is a great example of losing sales to other retailers and a change in consumer shopping behavior. Down by about 2.1% in dollars and 2.7% in units during the tracked period, the carbonated beverage segment is quickly changing as more consumers seek healthier alternatives to these products. Of course, the big players in the field are moving into other products, especially bottled water, flavored teas and energy drinks. In fact, bottled water produced a solid 5.1% increase in dollar sales and 4% increase in unit sales during the tracked period, testament to the change in consumer purchasing patterns. Wine, another growth area, showed a 4.2% increase in dollar sales and a 2.2% increase in unit sales. Yogurt, coffee-thanks to new delivery systems--and beer/ale/alcoholic cider also showed strong returns during the year.

[ILLUSTRATION OMITTED]

Many industry observers say changing consumer behavior is responsible for this change in sales. With more shoppers looking for healthy alternatives, grocery retailers will have to respond accordingly, mostly by changing their merchandise mix to include new items that consumers want to at least experiment with, if not simply purchase on a regular basis.

Take the snack nuts/seeds/com nuts category for instance. This segment that once was the domain of convenience stores has now become a huge business in grocery stores. So huge that it accounted for more than \$1.7 billion in sales at the supermarket, a 10.2% increase from the previous year. It is growing for two reasons. One is that consumers want to purchase the products at the same place that they buy their other grocery needs. The second is that suppliers are adding new packaging that fits into a supermarket planogram.

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

"We see a lot of suppliers changing packaging and promoting their products differently because they see an opportunity in the supermarket," says the West Coast retailer. "I expect that to continue because consumers are thinking differently."

As we always say in this spot, we encourage you to review our annual almanac and let us know your thoughts. We welcome your feedback.

Top 50 Supermarket Categories

52 weeks ended Jan.27

CATEGORY	\$sales (millions)	CHANGE VS. YEAR AGO	UNIT VOLUME (MILLIONS)	CHANGEVS. YEAR AGO
Carbonated beverages	11,504.5	-2.1%	5,175.2	2.7%
Milk	10,553.3	-2.7	3,608.6	-3.1
Fresh bread A rolls	9,356.8	-2.5	4,101.9	2.7
Salty snacks	8,871.9	2.8	3,596.8	0.2
Beer/ale /alcoholic cider	8,864.4	4.1	1,002.6	3.8
Natural cheese	7,967.5	2.4	2,474.4	2.3
Wine	6,515.5	4.2	727.2	2.2
Cold cereal	5,722.0	2.1	1,821.9	-3.4
Frozen dinners/entrees	5,567.1	4.1	2,135.5	-5.6
Yogurt	4,654.1	4.8	3,796.7	4.2
Bottled water	4,340.4	5.2	2,251.9	4.0
Ice cream/Sherbet	4,262.3	1.9	1,188.2	1.2
Refrigerated juices/drinks	4,259.8	1.1	1,460.1	-0.9
Coffee	4,229.1	7.5	633.9	5.2
Crackers	4,082.9	3.4	1,549.4	2.4
Cigarettes	4,035.3	-5.2	549.2	2.6
Cookies	3,873.1	2.8	1,474.6	1.0
Soup	3,786.5	0.7	2,909.0	3.7
Refrigerated fresh eggs	3,450.2	1.6	1,526.4	-0.5
Luncheon meats	3,450.2	-1.8	1,142.8	2.3
Breakfast meats	3,409.7	0.8	924.5	2.6
Bottled juices - shelf stable	3,294.4	-4.4	1,394.1	4.6

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Total chocolate candy	3,242.3	3.4	1,713.2	-3.9
Toilet tissue	3,096.9	-0.2	587.3	-4.0
Dog food	3,064.9	-0.2	835.3	2.5
Refrigerated salad/coleslaw	2,917.3	1.3	1,086.2	0.7
Frozen pizza	2,813.2	4.0	909.0	-3.1
Spirits/liquor	2,757.2	12.3	183.8	11.7
Frozen novelties	2,743.3	0.0	874.4	-2.6
Laundr detergent	2,367.7	-3.0	368.5	-4.4
Frozen seafood	2,339.8	1.7	332.1	-1.7
Vegetables	2,327.0	0.2	2,238.0	-3.0
Snack/granola bars	2,265.9	4.3	972.0	5.6
Frozen/refrigerated poultry	2,226.0	8.1	394.3	2.0
Shortening & oil	2,136.9	0.5	468.0	-0.8
Spice a/seasonings	2,090.4	4.4	916.0	1.5
Baby formula/electrolytes	2,053.2	0.1	146.1	-8.1
Dinner sausage	2,052.9	3.5	559.5	4.0
Processed cheese	2,037.9	3.3	622.8	-5.3
Cat food	2,030.4	0.8	1,411.2	-4.2
Creams/reamers	1,962.1	3.8	721.5	1.0
Paper towels	1,879.2	-0.3	499.9	3.6
Processed frozen/refrigerated poultry	1,779.2	4.8	347.1	3.9
Frozen plain vegetables	1,777.1	-0.9	1,043.7	2.7
Snack nuts/seeds/com nuts	1,771.0	10.2	493.7	1.3
Frankfurters	1,721.0	-0.9	677.0	-3.4
Mexican foods	1,682.7	1.3	801.7	-0.3
Pastry/doughnuts	1,657.7	0.5	618.3	0.7
Frozen breakfast food	1,654.4	1.6	555.4	-1.9

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Sports drinks	1,649.1	2.9	1,104.3	1.5
Natural Cheese Chunks				

Private label continues to dominate and observers say that will not change. Kraft has 13.4% of dollars thanks to the company's association with cheese products. Many say that they expect sales to grow in this category for the foreseeable future.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE AGO	UNIT SALES (MLLIONS)	CHANGE VS. YEAR	PRICE PER UNIT	AVG
Private label	\$1,174.9	-1.7%	35.2%	328.7	-1.2%	\$3.57	
Kraft Foods	447.8	0.0	13.4	142.8	2.1	3.13	
Tillamook County Creamery	217.8	4.8	6.5	38.9	2.3	5.59	
Cabot Creamery	169.3	10.0	5.0	51.5	12.0	3.28	
Lactalis USA	150.6	-4.3	4.5	30.4	-5.3	4.94	

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (millions)	CHANGE VS. YEAR	SHARE AGO	UNIT SALES (MLLIONS)	CHANGE VS. YEAR	PRICE PER UNIT	AVG
Private label	\$1,174.9	1.7%	35.2%	328.7	1.2%	\$3.57	
Kraft	250.5	2.5	7.5	87.2	-5.5	2.87	
Tillamook	179.4	1.6	5.3	32.3	0.1	5.55	
Cabot Vermont	129.2	6.1	3.8	38.7	8.8	3.33	
Kraft Cracker Barrel	115.1	7.2	3.4	34.6	29.4	3.33	
Laughing Cow Mini Babybel	108.5	-1.5	3.2	23.7	-5.3	4.57	
Crystal Farms	93.7	0.0	2.8	37.3	-2.3	2.51	
Belgioioso	91.7	9.4	2.7	19.6	10.7	4.67	

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

President	53.2	-3.0	1.6	9.0	5.4	5.88
Cacique Ranchero	48.9	2.8	1.4	14.4	-0.8	3.38
Category total	3,328.8	1.4		884.4	1.2	3.76

Source: SymphonyIRI Group
Natural Cheese Slices

The consumer fascination with cheese has definitely played a role in the growth of natural cheese slices. The category grew by 7.7% in dollars and 9.1% in units. Competition from a number of companies has helped keep price increases down.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MLLIONS)	CHANGE VS. YEAR	AVG PRICE PER UNIT
		AGO			AGO	
Private Label	\$595.7	5.4%	38.0%	217.8	5.3%	\$2.73
Sargento Food Co.	425.7	16.2	27.2	142.2	18.7	2.99
Kraft Foods	155.3	5.2	9.9	52.5	12.5	2.90
Tillamook County Creamery	63.4	-1.9	4.0	13.2	4.2	4.78
Belgioioso	33.3	18.3	2.1	4.7	19.9	\$7.07

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		AGO			AGO	
Private label	\$595.7	5.4%	38.0%	217.8	5.3%	\$2.73
Sargento	289.1	25.2	18.4	95.6	28.3	3.02
Sargento Deli Style	111.6	-2.4	7.1	37.8	-1.0	2.95
Kraft Big Slice	65.2	16.3	4.1	23.7	19.7	2.75
Tillamook	63.1	-2.0	4.0	13.1	-4.5	4.79
Kraft	38.2	-20.6	2.4	12.0	19.6	3.17
Belgioicso	33.3	18.3	2.1	4.7	19.9	7.07
Crystal	25.6	24.2	1.6	8.2	26.7	3.13

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Farms

Castle Wood Reserve	25.2	0.7	1.6	2.7	3.6	9.12
Sargento Natural Blends	24.9	18.2	1.5	8.7	24.4	2.84
Category total	1,564.5	7.7		492.8	9.1	3.17

Source: SymphonyIRI Group
Natural Shredded Cheese

Private label sales are the clear leader in the \$4.1 billion category. Store brands captured almost 60% of dollars. Kraft was the top national brand, at 17.6% market share, up 2.4%. Overall the category was up 3.7% in dollars and 2.5% in units.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVG PRICE PER AGO
Nestle HealthGare Nutrition	\$699.1	2.2%	78.4%	581.6	4.9%	\$1.20
Beech-Nut Corp.	98.6	10.9	11.1	152.3	15.0	0.65
The Hain Celestial Group	47.4	-5.5	5.3	46.4	-4.9	1.02
Private label	21.4	10.6	2.4	24.8	9.5	0.87
Bay Valley Foods	5.6	-27.4	0.6	11.6	-31.1	0.48

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TOP BRANDS	\$SALES (millions)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVG PRICE PER AGO
Private label	\$2,433.4	2.8%	59.1%	790.6	1.5%	\$3.08
Kraft	726.6	2.4	17.6	245.0	0.7	2.96
Sargento	306.4	1.7	7.4	103.1	0.5	2.97
Crystal Farms	127.4	7.7	3.1	47.7	8.4	2.96

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Kraft Philadelphia	93.3	41.8	2.2	33.9	36.1	2.75
Borden	62.9	6.2	1.5	27.2	6.0	2.31
Sargento Artisan Blends	35.2	-8.2	0.8	12.4	-8.7	2.80
Dr Giorno	27.8	-5.7	0.6	6.1	-9.5	4.50
Tillamook	27.1	0.9	0.6	7.6	-7.5	3.54
Stella	23.9	6.8	0.5	6.4	5.5	3.70
Category total	4,111.6	3.7		1,351.8	2.5	3.04

Source: SymphonyIRI Group

Refrigerated Bacon

There is a growing battle for bacon in the consumer's refrigerator. While private label holds a slight lead over Kraft for first place, Hormel is inching up with its own brands. Still, Oscar Meyer is the top selling brand.

[ILLUSTRATION OMITTED]

VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MLLIONS)	CHANGE VS. YEAR AGO	Avg Price
Private label	\$745.8	2.5%	20.5%	192.0	4.6%	\$3.88
Kraft Foods	736.5	-4.5	20.3	166.7	-6.7	4.42
Hormel Foods	442.8	1.7	12.2	93.1	0.9	4.75
Wright brand Foods	260.0	13.6	7.1	30.6	19.7	8.49
Farmland Foods	184.8	10.3	5.1	47.9	14.8	3.85

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (millutions)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MLLIONS)	CHANGE VS. YEAR AGO	Avg Price
Private label	\$745.8	2.5%	20.5%	192.0	4.6%	\$3.88
Oscar Mayer	726.6	-5.2	20.0	163.5	-7.7	4.44
Hormel	322.7	-0.4	8.9	65.9	-1.5	4.89

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**Black
Label**

Wright	256.3	13.9	7.0	30.4	19.9	8.43
Farmland	180.8	11.2	4.9	46.6	16.7	3.87
Smithfield	143.8	18.0	3.9	36.7	30.8	3.92
Gwaltney	114.8	-1.4	3.1	33.4	2.9	3.43
Bar-S	90.9	-5.4	2.5	29.6	-2.6	3.07
Hormel	90.5	5.6	2.5	20.2	4.4	4.48
Butterball Everyday	65.2	14.9	1.8	28.4	14.3	2.29
Category total	3,628.0	1.2		888.4	2.3	4.08

Source: SymphonyIRI Group

Refrigerated Frankfurters

Brand names dominate this segment, with Ball Park, Oscar Meyer, Bar-S and Hebrew National all posting solid market share numbers. Units fell slightly but dollars picked up a bit suggesting price increases during the tracked period.

[ILLUSTRATION OMITTED]

VENDORS	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG
	(MILLIONS)	VS.		(MILLIONS)	VS.	PRICE
		YEAR			YEAR	PER
		AGO			AGO	UNIT
Hillshire Brands	\$608.2	1.5%	23.8%	179.2	0.5%	\$3.39
Kraft Foods	526.2	-5.2	20.6	173.1	-11.0	3.04
Bar-S Foods Co.	326.7	2.0	12.8	279.2	-1.7	1.17
ConAgra Foods	188.1	-5.2	7.3	43.9	-9.3	4.28
Specialty Foods Group	176.2	14.7	6.9	43.5	16.6	4.04

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG
	(millions)	VS.		(millions)	VS.	PRICE
		YEAR			YEAR	PER
		AGO			AGO	UNIT
Ball Park	\$567.1	2.0%	22.2%	162.2	1.1%	\$3.49
Oscar	526.2	-5.2	20.6	173.1	-11.0	3.04

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Mayer

Bar-S	323.5	2.2	12.6	278.7	-1.7	1.16
Hebrew National	188.1	-5.2	7.3	43.9	-9.3	4.28
Nathan's Famous	169.2	15.5	6.6	39.4	19.0	4.30
Private label	97.2	5.3	3.8	39.4	-4.0	2.47
Gwaltney	67.7	0.5	2.6	44.6	-8.2	1.52
Sabrett	32.0	5.2	1.2	5.7	6.1	5.54
Eckrich	27.0	-0.8	1.0	15.2	4.1	1.78
Gwaltney Great Dogs	26.4	7.1	1.0	6.9	-1.9	3.83
Category total	2,553.0	0.8		1,011.7	-2.8	2.52

Source: SymphonyIRI Group

Refrigerated Sliced Lunchmeat

Not surprisingly, Oscar Meyer dominated sales in the lunchmeat category during the tracked period. However, this mature category is not seeing much growth and that has some retailers concerned. Can some company spark some growth in the lunch-meat segment?

[ILLUSTRATION OMITTED]

VENDORS	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG
	(MILLIONS)	VS.	(MLLIONS)	VS.	PRICE	
		YEAR		YEAR	PER	AGO
Kraft Foods	\$2,071.2	0.0%	38.7%	605.5	-1.0%	\$3.42
Private label	774.8	-2.5	14.5	250.9	-0.4	3.09
Hillshire Brands	643.5	-6.5	12.0	175.9	-4.8	3.66
Land O'Frost	415.2	5.1	7.7	113.3	4.0	3.66
Bar-S Foods Co.	176.3	8.5	3.3	100.1	14.9	1.76

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG
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BRANDS	(millions)	VS.		(MILLIONS)	VS.	PRICE
		YEAR			YEAR	PER
		AGO			AGO	UNIT
Oscar Mayer	\$1,165.1	-1.6%	21.8%	367.7	-2.3%	\$3.17
Oscar Mayer Deli Fresh	818.9	1.9	15.3	215.8	1.0	3.80
Private label	774.6	-2.5	14.5	250.9	-0.4	3.09
Hillshire Farm Deli Select	427.3	-19.5	8.0	117.7	-17.9	3.63
Land O'Frost Premium	302.0	4.3	5.6	74.6	6.5	4.04
Bar-S	170.9	8.9	3.2	99.1	15.2	1.72
Castle Wood Reserve	148.5	-0.3	2.7	18.8	-3.5	7.87
Buddig	99.7	-7.7	1.8	123.8	-6.1	0.81
Hormel Natural Choice	99.7	7.7	1.8	32.8	5.6	3.04
Oscar Mayer Carving Board	87.1	2.2	1.6	22.0	-1.2	3.95
Category total	5,342.9	-0.5		1,740.3	-0.8	3.07

Source: SymphonyIRI Group

Dry Dinner Mixes (without meat)

General Mills' Betty Crocker brand has a huge lead in market share but its dollars fell by more than 12%. Kraft's Velveeta Cheesy Skillets might have been some of the reason, showing a 98% increase.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR YEAR AGO	AVG. PRICE PER UNIT
General Mills	\$339.2	-12.6%	70.2%	210.2	-11.7%	\$1.61
Kraft Foods	93.1	98.9	19.2	42.7	74.6	2.18
Private label	19.6	-14.2	4.0	15.5	-16.7	1.20
Golden	14.6	-12.9	3.0	13.4	-9.3	1.09

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Grain
Macaroni
Co.

ConAgra 6.1 21.8 1.2 1.8 31.4 3.20
Foods

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Betty Crocker Hmbrgr Helper	\$260.4	2.6%	53.9%	164.4	-5.2%	\$1.58
Kraft Velveeta Cheesy Skillets	92.8	98.4	19.2	42.6	74.2	2.10
Betty Crocker Tuna Helper	34.5	-14.2	7.1	21.6	-18.2	1.59
Private label	19.6	-14.2	4.0	15.5	-16.7	1.26
Pasta Roni	14.6	-7.9	3.0	13.4	-6.4	1.09
Betty Crocker Chicken Helper	10.0	-12.7	2.0	6.7	-12.6	1.48
Betty Crocker Asian Chckn Helper	8.9	-12.2	1.8	5.0	-19.0	1.77
Betty Cracker whie gm Hmbrgr Hlpr	7.5	-33.5	1.5	4.9	-33.7	1.53
Progresso Kitchen Favorites	6.6	5,872.0	1.3	1.9	6,420.1	3.46
Zatarain's	5.6	19.5	1.1	3.3	23.1	1.68
Category	482.9	-1.1		289.6	-4.2	1.67

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total

Source: SymphonyIRI Group

Dry Macaroni and Cheese Mixes

A combination of steady sales growth and a jump in prices helped the category post a solid 7.3% gain in dollars. Kraft, well known for its product in this category had a 79% market share. Private label had a 13.9% share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	PRICE PER AGO	AVG.
		AGO					
Kraft foods	\$938.7	6.0%	79.0%	494.5	-0.4%	\$1.90	
Private label	165.2	5.7	13.9	163.4	-4.9	1.01	
Annie's	69.3	20.5	5.8	33.2	21.8	2.08	
General Mills	5.5	N/A	0.4	6.1	N/A	0.89	
S T Specialty Foods	4.8	33.7	0.4	8.7	-4.7	0.55	
TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	PRICE PER AGO	AVG.
		AGO					
Kraft	\$433.2	5.8%	36.4%	276.6	1.2%	\$1.57	
Kraft Velveeta	319.9	9.4	26.9	131.5	3.2	2.43	
Private label	165.2	5.7	13.9	163.4	-4.9	1.01	
Kraft Deluxe	118.6	8.4	9.8	50.7	4.3	2.30	
Annie's Homegrown	81.8	20.9	5.2	31.0	21.8	\$1.99	
Kraft Easy Mac	37.4	-7.6	3.1	11.6	-11.6	3.22	
Anne'a Homegrown Deluxe	7.5	17.7	0.8	2.2	21.8	3.42	
Betty Crocker	5.5	N/A	0.4	6.1	N/A	0.89	
Category total	1,188.0	7.3		710.0	0.1	1.67	

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Source: SymphonyIRI Group

Shredded Processed/Imitation Cheese

Though not a huge category, sales continue to climb. Kraft topped the category with 34.8% market share, up 13.2%. Private label was a close second at 28.4%, which was down 11.3% from last year.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
						PRICE
						PER UNIT
Kraft Foods	\$16.8	13.2%	34.8%	7.3	27.7%	\$2.29
Private label	13.7	-11.3	28.4	7.7	-11.8	1.78
Galaxy Nutritional Foods	6.4	4.4	13.2	1.7	2.2	3.57
Dairy Farmers of America	3.9	-12.9	8.2	2.6	-12.0	1.47
Roma Pizza Works Co.	1.9	75.9	3.9	.527	42.6	3.61

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
						PRICE
						PER UNIT
Kraft Velveeta	\$16.0	41.5%	33.2%	7.0	63.3%	\$2.28
Private label	13.7	-11.3	28.4	7.7	-11.8	1.78
Galaxy Nutritional Foods Veggie	8.0	3.4	12.5	1.7	1.3	3.54
Borden Ched O-Mate	2.2	-11.7	4.7	1.9	-11.2	1.19
American Accent	1.8	26.8	3.8	.37	24.0	4.91
Borden Cheddar Melt	1.6	-15.3	3.3	.71	-15.7	2.27
Imo's	1.2	11.9	2.4	.36	-1.1	3.31

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Whitehall

Specialties	.788	-8.4	1.6	.14	-13.7	5.58
Kraft Imo's	.748	-78.8	1.5	.30	-79.2	2.52
Provel	.700	9,624.1	1.4	.16	7,434.4	4.26
Category total	48.3	2.6		21.4	2.7	2.26

Source: SymphonyIRI Group

Bottled Fruit Juice Blend (Shelf Stable)

The category struggled mightily, down 14.1% in dollars and 13.7% in units. Some of the smaller brands did enjoy success, including Langer's, Zico and Apple & Eve.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
						PER UNIT
Campbell Soup Co.	\$99.8	-18.8%	29.6%	33.0	-15.1%	\$3.02
Nestle USA	77.4	-5.7	23.0	24.7	-6.6	3.13
Welch Foods	42.0	-23.7	12.5	8.9	-33.3	4.72
Private label	30.9	-20.9	9.2	11.5	-22.3	2.68
In Zone	16.1	-8.8	4.7	6.0	-6.9	2.64

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
						PER UNIT
V8 V Fusion	\$98.5	-18.8%	29.3%	32.9	-15.1%	\$2.99
Nestle Juicy Juice	77.3	-5.6	23.0	24.7	-6.4	3.13
Welch's	42.0	-23.7	12.5	8.9	-33.3	4.72
Private label	30.9	-20.9	9.2	11.5	-22.3	2.68
Belly-washers	16.1	-8.8	4.7	6.0	-5.9	2.64
Old	9.4	-18.6	2.8	3.6	-20.7	2.54

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Orchard

Langer's	8.5	80.1	2.5	3.4	94.9	2.49
Zico	5.7	11.6	1.7	2.4	14.1	2.33
Apple & Eve	3.6	33.0	1.0	.76	-19.0	4.76
Tree Top	3.5	-8.9	1.0	1.2	-18.9	2.91
Category total	336.3	-14.1		107.5	-13.7	3.13

Source: SymphonyIRI Group

Bottled Juice and Drink Smoothies (Shelf Stable)

With V8 holding a resounding lead in market share, the Campbell's continues to dominate the segment. Observers say that there is room for smaller companies to grab share by offering new concoctions.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Campbell Soup Co.	\$30.4	36.5%	71.6%	11.6	26.2%	\$2.81
South Beach Beverage Co.	6.7	-17.5	15.9	5.7	-17.3	1.18
Starbucks Coffee Co.	2.3	6.3	5.5	.58	5.7	4.10
Ella's Kitchen	1.7	37.3	4.1	1.2	37.7	1.44
Revolution Foods Product	.921	.12.1	2.1	.234	-6.2	3.93

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
V8 V Fusion	\$18.7	89.1%	44.1%	6.1	82.3%	\$3.03
V8 Splash Smoothies	11.6	-5.6	27.4	5.4	-6.4	2.14
SoBe Smooth	6.7	-17.5	15.9	5.7	-17.3	1.18
Ella's	1.7	37.3	4.1	1.2	37.7	1.44

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Kitchen

Vivano Strawberry Banana	1.7	8.2	4.0	.42	7.6	4.09
Revolution Foods Mashup's	.92	-12.1	2.1	.23	-6.2	3.93
Vivano Banana Chocolate	.64	1.4	1.5	.16	0.8	4.10
VIP	.07	1.7	0.1	.04	0.7	1.99
Squeez R	.05	-33.7	0.1	.050	-38.8	1.11
Sunkist Light	.05	-19.2	0.1	.02	-11.0	2.40
Category total	42.4	20.2		19.5	8.4	2.18

Source: SymphonyIRI Group

Bottled Fruit Drinks (Shelf Stable)

As consumers seek healthy alternatives, the segment has suffered. Brand leader Hawaiian Punch was down 14.7% in dollars. Campbell's V8 Splash showed a solid double-digit dollar gain.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Dr Pepper/ Snapple	\$437.6	-8.8%	27.2%	214.3	-8.1%	\$2.04
Group Campbell Soup Co.	244.0	0.7	15.2	100.3	3.1	2.43
Tampico Beverages	125.8	0.7	7.8	83.7	1.4	1.50
Welch Foods	120.9	4.2	7.5	42.2	10.3	2.86
Private label	93.6	6.6	5.8	55.6	2.2	1.68

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Hawaiian Punch	\$311.9	-14.7%	19.4%	150.4	15.3%	\$2.07

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V8 Splash	166.6	13.8	10.3	72.1	14.0	2.31
Tampico	125.8	0.9	7.8	83.7	1.7	1.50
Private label	93.6	6.6	5.8	55.6	2.2	1.68
Welch's	66.8	-8.5	4.1	205	-10.4	3.25
Kool Aid Bursts	62.4	-4.2	3.8	59.4	-4.4	1.05
Snapple	61.2	14.7	3.8	36.9	25.1	1.66
SunnyD	52.8	52.0	3.3	22.9	38.8	2.30
V8 V Fusion Light	46.9	-11.4	2.9	15.2	-7.2	3.07
Motts for Tots	46.2	7.5	2.8	17.5	4.6	2.63
Category total	1,604.7	-0.5		899.4	-0.6	1.78

Source: SymphonyIRI Group

Domestic Beer

Domestic beer sales gained momentum, with a dollar sales increase of more than 4.5% versus last year. Case sales were up nearly 2.0%. Bud Light and Coors Light sales topped the \$1 billion mark while other labels such as Michelob Ultra, Yuengling, Sam Adams and Shock Top Belgian White Ale performed admirably as well.

Total U.S. sales through supermarkets, drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	CASES (MILLION)	CHANGE VS. YEAR AGO	AVG. PRICE PER CASE
Bud Light	\$ 1,938.5	0.5%	107.0	-0.2%	\$18.11
Coors Light	1,012.4	5.6	55.9	4.6	16.10
Miller Lite	866.1	0.0	46.2	0.7	17.94
Budweiser	735.6	-3.7	40.5	-4.3	16.16
Natural Light	355.4	-3.5	24.6	-5.6	14.41
Michelob Ultra Light	346.9	9.0	157	5.7	21.98
Busch Light	304.5	2.3	21.4	0.4	14.21
Miller High Life	204.2	-3.9	13.6	5.3	14.75
Busch	194.9	-1.8	13.3	-4.0	14.63

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Keystone Light	184.1	4.8	13.4	-5.9	13.72
Bud Light Platinum Lager	169.9	11,771.4	6.9	12,319.2	24.34
Bud Light Lime	150.0	-6.1	6.1	-6.6	24.38
Blue Moon Belgian White Ale	127.3	6,4	4.3	5.4	29.52
Yuengling Traditional Lager	125.0	12,1	6.1	11.0	20.35
Pabst Blue Ribbon	118.6	22.6	7.7	20.9	15.26
Natural Ice	99.6	-3.5	6.9	-5.6	14.37
Miller Genuine Draft	94.9	-10.7	5.3	-9.9	17.89
Samuel Adams Seasonal	92.6	10.6	3,0	7.9	30.43
Coors	91.7	9.2	5.1	9.8	17.87
Milwaukee's Seat Light	74.0	-5.7	5.7	-6.9	12.77
Miller 64	73.7	-5.5	4.0	-5.0	18.10
Budweiser Select 55	70.5	-15.7	37	-15.0	18.74
Sierra Nevada Pale Ale	69.1	8.2	2.2	7.0	30.91
Samuel Adams Boston Lager	59.9	-4.5	2.0	6.8	29.93
Shock Top Belgian White Ale	58.5	41.3	2.1	40.9	27.36
Icehouse	58.2	4.6	3.8	-4.7	14.93
Budweiser Select	49.1	-18.9	2.7	-18.7	18.03
Milwaukee's Best Ice	47.5	3.7	3.7	2.5	12.69
Rolling Rock	46.1	12.6	2.4	26.0	18.47
Samuel Adams	45.9	16.6	1.5	14.4	26.84

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Variety Pack

Leinenkugel Seasonal	45.5	61.5	1.6	62.9	27.13
New Belgium Fat Tire Amb Ale	44.6	3.6	1.4	2.9	31.32
Blue Moon Seasonal	43.7	-3.8	1.4	-4.7	30.46
Bud Ice	43.1	4.0	2.6	4.7	16.48
Steel Reserve High Grvity Lgr	37.9	7.1	2.3	4.4	6.19
Total	9,714.3	4.6	515.1	1.98	18.66

Source: SympiwnyIRI Group

Imported Beer

On the import side, dollar sales and case sales were both up (3.3%and 3.0% respectively) versus last year. Some of the biggest gainers include Dos Equis XX Lager Especial, Stella Artois Lager, Guinness Black Lager, Tecate Light and Newcastle Seasonal The top sellers were Corona Extra and Heineken.

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	CASES (MILLION)	CHANGE VS. YEAR AGO	AVG. PRICE PER CASE
Corona Extra	\$555.4	0.7%	20.4	0.3%	\$27.13
Heineken	347.0	0.0	12.7	0.6	27.31
Modelo Especial	174.5	26.6	7.1	25.0	24.40
Corona Light	153.0	2.0	5.9	2.5	27.34
Stella Ariois Lager	126.9	24.7	3.6	25.6	32.96
Dos Equis XX Lager Especial	103.7	22.9	3.7	20.8	27.56
Tecate	94.9	-2.6	5.3	0.6	17.70
Guinness Draught	57.5	1.4	1.6	1.6	33.86
Newcastle Brown Ale	57.3	-2.8	1.9	-1.6	29.85
Heineken Premium Light Lager	53.4	-9.2	1.9	-8.1	27.77
BECKA	46.6	-9.8	1.7	-9.7	26.71

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Pacifico	46.6	3.7	1.7	4.7	26.38
Labatt Blue	43.0	-7.4	2.3	-7.1	18.21
Labatt Blue Light	38.2	-3.7	2.2	-3.8	17.37
Foster's Lager	30.5	-2.5	1.2	2.5	23.81
Negra Modelo	28.9	10.9	1.0	12.4	28.74
Guinness Extra Stout	26.2	3.6	.75	3.9	35.04
Amstel light	26.0	-8.8	.90	-8.7	28.65
Dos Equis XX Ambar Lager	25.7	1.6	.93	1.0	27.68
Red Stripe	24.4	-5.7	.86	-4.4	28.56
Molson Canadian Beers of Mexico Variety Pack	16.6	-9.0	.84	.8.2	19.65
Tec ale Light	16.5	120.5	.68	92.4	24.49
Tec ale Light	14.8	20.3	.87	24.4	17.04
Victoria	12.5	-31.4	.43	-31.1	29.30
Peroni Nastre Azzurro	11.5	12.7	.35	11.2	32.95
Bass Ale	11.5	-15.4	.39	-15.0	29.01
Guinness Black Lager	11.5	125.2	.35	143.9	32.79
Foster's Premium Ale	11.4	11.4	.49	11.2	23.38
St Pauli Girl	11.1	-29.0	.41	-30.4	27.20
Høegarden White Ale	10.6	13.5	.29	13.0	36.07
Newcastle Seasonal	9.7	126.2	.33	128.5	29.32
Sapporo Premium Draft	9.5	5.6	.27	4.8	35.21
Pilsner Urquell Smithwick's	6.5	-13.5	.26	15.8	32.67
	73	-10.6	.22	-9.5	32.27

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Irish Ale

Presidente	7.2	-12.9	.31	-15.6	23.30
Pitsener					
Total	2,424.2	3.3	91.2	3.0	26.58

Source: SymphonyIRI Group
Ground Coffee

Starbucks was the biggest winner, up 7.9% in dollars and 8.1% in units. Other gainers included Community and Chock Full O' Nuts. Top brand Folgers accounted for 32% of category sales, neary double that of number two Maxwell House.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
J M Smucker Co.	\$1,801.6	-4.4%	41.0%	230.3	-5.4%	\$7.82
Kraft Foods	870.1	4.2	19.8	131.0	5.8	8.64
Private label	447.7	-0.3	10.2	80.4	-3.4	5.57
Starbucks Coffee Co.	340.3	3.5	7.7	38.6	3.2	8.82
Massimo Zanetti Beverage USA	177.2	3.4	4.0	34.6	7.3	5.12

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

1	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Folgers	\$1,407.2	-3.7%	32.0%	182.3	4.6%	\$7.72
Maxwell House	720.5	-4.7	16.4	110.6	2.7	6.51
Private label	447.7	-0.3	10.2	80.4	3.4	5.57
Starbucks	335.3	7.9	7.8	38.0	8.1	8.83
Dunkin' Donuts	294.8	-1.8	6.7	30.7	-0.1	6.60
Eight O'Clock	99.4	-0.8	2.3	17.4	-3.2	5.70
Community	86.5	4.1	2.0	12.1	-2.2	7.12

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Chock Full O'Nuts	83.3	2.4	1.9	17.1	7.8	4.86
Peets Coffee	82.3	3.9	1.9	8.7	5.2	9.49
Gevalia	76.6	2.3	20.8	1.7	10.9	2,545.4
Category total	4,397.1	-0.3		646.5	-1.1	6.80

Source: SymphonyIRI Group

Instant Decaffeinated Coffee

Eight of the top ten brands were down versus last year. Despite losing almost 5% of dollar sales, top brand Folgers increased units sales by 10.6%. The only brands to see dollar gains were Nescafe Clasico and Starbucks Via, up 13.8% and 17.3% respectively.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVG. PRICE PER UNIT
J M Smucker Co.	\$43.0	-4.7%	37.1%	9.5	10.6%	\$4.52
Nestle USA	30.6	-4.5	26.4	5.7	-18.5	5.33
Kraft Foods	25.0	12.7	21.6	5.9	-12.3	4.24
Private label	12.3	-8.0	10.6	2.5	-8.1	4.85
Starbucks Coffee Co.	3.8	17.3	3.3	0.5	13.6	8.30

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVG. PRICE PER UNIT
		AGO			AGO	
Folgers	\$43.0	-4.7%	37.1%	9.5	10.6%	\$4.52
Nescafe Tasters Choice	20.9	-10.4	18.1	4.0	-26.5	5.22
Private label	12.3	-8.0	10.6	2.5	-8.1	4.85
Maxwell House International	10.2	-17.3	8.6	3.3	-14.9	3.13
Nescafe Clasico	9.6	13.8	8.3	1.7	11.8	5.59
Maxwell House	6.8	-7.6	7.6	1.5	-7.0	5.96

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Maxwell House	5.9	-10.9	5.1	1.1	-10.3	5.18
Sanka						
Starbucks Via	3.8	17.3	3.3	.46	13.6	8.30
Cafe Bustelo	.26	-5.0	0.2	.06	-9.4	4.38
Community	.26	-6.9	0.2	.04	-7.9	6.51
Category total	1157	-6.7		24.4	-6.0	4.74

Source: SymphonyIRI Group
Single Cup Coffee

The single cup coffee category exploded last year as dollars were up more than 89%. The category leader was Green Mountain with 24.4% of sales, up 62.6% from a year ago. Starbucks was the top gainer, up more than 650%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG.
	(MILLIONS)	VS. YEAR AGO		(MILLIONS)	VS. YEAR AGO	PRICE PER UNIT
Green Mountain Coffee Roasters	\$956.5	64.4%	55.3%	87.0	66.1%	\$10.99
J M Smucker Co.	341.8	97.9	19.8	33.9	90.7	10.07
Starbucks Coffee Co.	238.3	655.1	13.8	21.4	741.4	11.16
Diedrich Coffee	111.6	79.2	6.4	10.2	83.5	10.98
Kraft Foods	27.0	6.0	1.6	3.6	-15.9	7.42

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG.
	(MILLIONS)	VS. YEAR AGO		(MILLIONS)	VS. YEAR AGO	PRICE PER UNIT
Green Mountain	\$421.5	62.6%	24.4%	41.4	71.5%	\$10.18
Folgers Gourmet Selections	267.1	95.6	15.4	25.7	87.2	10.38
Starbucks	238.2	654.8	13.8	21.3	741.1	11.16
Donut House Collection	129.8	148.1	7.5	10.7	106.3	12.10

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Newman's Own Organics	126.2	36.9	7.3	8.4	27.8	15.07
Donut Shop Coffee People	82.7	105.8	4.8	7.5	110.9	10.97
Keurig Caribou Coffee	80.7	25.3	4.7	6.2	21.9	13.01
Millstone	74.7	106.9	4.3	8.2	102.7	9.08
Tully's Coffee	60.0	-0.8	3.5	6.8	0.0	8.84
Barista Prima Coffeehouse	35.6	479.0	2.1	3.4	583.1	10.51
Category total	1,730.5	89.3		163.9	84.3	10.56

Source: SymphonyIRI Group
Doughnuts

Little Debbie was not so little last year, as the brand was the top gainer up 39.8% in dollars. Consumers looked to private label a bit less as dollars were off 3.5%. Not surprisingly, all Hostess products saw a significant dip as well.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Bimbo Bakeries USA	\$260.5	8.0%	25.1%	84.6%	8.5%	\$3.08
Hostess Brands	198.4	-14.6	19.1%	101.1	-13.3	1.96
Private label	189.6	-3.5	18.2	83.5	-6.1	2.27
Krispy Kreme Doughnut Co.	158.5	3.0	15.3	39.7	1.5	3.99
Mckee Foods Corp.	86.2	39.9	8.3	51.2	32.2	1.68

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private	\$189.6	-3.5%	18.2%	83.5	-6.1%	\$2.27

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label1

Krispy Kreme	153.0	2.6	14.7	37.8	0.9	4.05
Hostess Donettes	146.2	-14.4	14.1	77.7	-13.3	1.88
Entenmann's	119.0	7.4	11.4	35.0	6.3	3.40
Little Debbie	86.2	39.8	8.3	51.2	32.2	1.68
Entenmann's Softee's	69.1	6.3	6.6	19.9	4.9	3.46
Entenmann's Pop 'ems	43.4	19.8	4.2	16.7	27.2	2.60
Blue Bird	26.5	0.8	2.5	15.1	-2.3	1.76
Hostess Sweet Sixteen	25.9	-14.9	2.5	12.2	-15.0	2.13
Hostess	19.2	-13.9	1.8	7.6	-9.8	2.53
Category total	1,039.5	2.4		419.9	1.0	2.48

Source: SymphonyIRI Group

Refrigerated Orange Juice

Tropicana held the top brand with its Pure Premium products, with \$945.2 million in sales. Minute Maid was up 152.1% in dollars though Minute Maid Premium was down 17.7%. Overall, the category was flat in dollars, down 2.7% in units.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
						PER
						UNIT
Coca Cola Co.	\$1,081.0	0.4%	33.0%	-2.9%	311.2	\$347
Tropicana Dole Beverages	989.6	-1.1	30.2	-5.1	3.80	260.3
Private label	555.4	-2.4	17.0	196.8	-0.8	2.82
Citrus World	428.3	6.7	13.1	127.6	1.3	3.36
Sweeney Enterprises	38.5	0.8	1.2	17.3	4.3	2.23

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
Tropicana Pure Premium	\$945.2	-1.6%	28.9%	245.2	-5.9%	\$3.86
Simply Orange	652.5	1.3	19.9	181.8	-1.0	3.59
Private label	555.4	-2.4	17.0	196.8	-0.8	2.82
Florida's Natural	402.3	7.7	12.3	116.4	2.1	3.46
Minute Maid Premium	294.3	-17.7	9.0	85.6	-21.6	3.44
Minute Maid	91.2	152.1	2.8	30.2	153.7	3.02
Homemaker	38.5	0.8	1.2	17.3	4.3	2.23
Minute Maid Premium Kids Plus	36.6	-6.6	1.1	11.3	-11.4	3.23
Dole	19.2	64.9	0.6	7.5	48.7	2.56
Citrus World Donald Duck	18.2	-0.7	0.6	7.9	0.3	2.31
Category total	3,272.8	-0.3		971.8	-2.7	3.37

Source: SymphonyIRI Group
 Ready-to-Eat Cereal
 Kellogg's (30.6%) and General Mills (30.1%) continue to go neck and neck for cereal supremacy. However, private label sales outdid all brands, capturing 9.0% of dollars. though units did regress nearly 3.5%. Overall, the category remained flat.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
Kellogg Co.	\$2,896.4	0.3%	30.6%	829.9	-1.4%	\$3.24
General Mills	2,858.3	-1.6	30.1	854.1	-3.6	3.35
Post Holdings	984.4	-4.0	10.4	311.1	-6.3	3.16

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Private label	857.8	0.1	9.0	348.8	3.4	2.46
Mom Brands	653.2	5.1	6.9	171.8	-0.9	3.80

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	\$857.8	0.1%	9.0%	348.8	-3.4%	\$2.46
General Mills Hny Nt Cheerios	543.1	1.4	5.7	151.4	-0.8	3.59
Kelloggs Frosted Flakes	435.1	9.4	4.6	133.3	5.0	3.27
Post Honey Bunches of Oats	392.6	-9.8	4.1	118.6	-12.6	3.31
General Mills Cheerios	374.7	0.1	4.0	113.9	-2.6	3.29
General Mills Cnrrnon Tst Crnch	292.8	-6.0	3.1	84.7	-12.3	3.45
Kelloggs Frosted Mini Wheats	287.3	1.3	3.0	85.1	1.0	3.38
General Mills Lucky Charms	247.4	4.1	2.6	73.5	0.1	3.37
Kelloggs Special K	225.6	-14.4	2.4	67.6	-15.0	3.34
General Mills Mitt Grn Cheerios	192.9	24.3	2.0	54.7	25.7	3.53
Category	9,480.7	-0.2		2,957.4	-2.4	3.21

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

total

Source: SymphonyIRI Group

Frozen Yogurt

Frozen yogurt sales continue to soar. Dollar and units were up 28.5% and 33.8% respectively. Ben & Jerry's brands were the biggest gainers followed by Kemps. Like its ice cream counterpart, private label sales remained strong.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG.
	(MILLIONS)	VS.		(MILLIONS)	VS.	PRICE
		YEAR			YEAR	PER
Private label	\$59.1	19.9%	19.2%	19.0	32.9%	\$3.10
Ben & Jerry's Homemade	49.1	118.5	16.0	14.0	133.4	3.49
Dreyer's Grand Ice Cream Holdings	42.8	-24.9	13.9	10.6	-26.9	4.03
Kemp's	28.6	17.8	9.3	7.6	17.9	3.76
Turtle Mountain	26.0	16.8	8.50	4.8	7.0	5.33

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES	CHANGE	VS YEAR	SHARE	UNIT SALES
	(MILLIONS)		AGO		(MILLIONS)
Private label	\$59.1		19.9%	19.2%	19.0
Ben & Jerry's	25.8		10,601,403.4	8.4	8.0
Ben & Jerry's Froyo	23.2		3.4	7.5	6.0
Kemp's	18.6		27.8	6.0	5.0
Wells Blue Bunny	18.2		17.2	5.9	4.5
Dreyer's Edy's Slowchurned	17.3		-24.2	5.6	4.3
Healthy Choice	13.7		N/A	4.4	4.7
So Delicious	12.4		156.9	4.0	2.3
Haagen-Dazs	11.6		-29.0	3.8	2.9

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Turkey Hill	9.9	-1.1	3.2	3.2
Category total	306.9	28.5	84.1	
TOP BRANDS CHANGE VS AVG YEAR AGO PRICE PER UNIT				
Private label	32.9%	\$3.10		
Ben & Jerry's	12,916,0981	3.22		
Ben & Jerry's Froyo	0.3	3.84		
Kemp's	27.7	3.72		
Wells Blue Bunny	13.7	4.00		
Dreyer's Edy's Slowchurned	-26.4	4.03		
Healthy Choice	N/A	2.88		
So Delicious	145.4	6.31		
Haagen-Dazs	-31.2	3.97		
Turkey Hill	-1.9	3.10		
Category total	33.8	3.65		

Source: SymphonyIRI Group

Ice Cream

Ice cream continues to be a consumer favorite as sales increased 2.1% versus last year. Top gaining brands include Dryer's Edy's Grand,Breyers Blasts and Wells Blue Bunny. Private brand remained strong, accounting for more than 22% of sales.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	\$1,138.1	0.1%	22.4%	353.1	-1.2%	\$3.22
Dreyer's Grand Ice Crm Hldngs	960.6	-0.2	18.9	243.6	-2.9	3.94
Good	680.4	-8.1	13.4	187.8	-6.3	3.62

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Humor/
Breyers
Ice Crm

Blue Bell Creameries	501.9	7.3	9.9	123.7	6.2	4.06
Wells Dairy	386.2	8.8	7.6	89.8	5.4	4.30

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
Private label	\$1,138.1	0.1%	22.4%	353.1	-1.2	\$3.22
Blue Bell	501.9	7.3	9.9	123.7	6.2	4.06
Breyers	473.8	-8.5	9.3	130.8	-8.4	3.62
Haagen-Dazs	318.9	8.9	6.3	77.0	5.9	4.14
Ben & Jerry's	314.4	2.3	6.2	83.0	-0.3	3.19
Dreyer's Edy's Slowchurned	295.1	-4.1	5.8	75.0	-6.7	3.93
Wells Blue Bunny ice cream	289.7	9.3	5.7	67.9	6.0	4.26
Dreyer's Edy's Grand	182.3	26.5	3.6	47.7	23.6	3.82
Turkey Hill	180.8	7.0	3.5	60.7	6.5	2.98
Breyers Blasts	106.2	16.9	2.1	30.2	16.8	3.51
Category	5,061.9	2.1		1,381.3	0.4	3.66

Source: SymphonyIRI Group
Sherbet/Sorbet/Ices

The category remained flat. Blue Bell was clearly the biggest brand gainer, up more than 13%. Kemp's and Talenti also had strong years. Private label captured the lion's share with more than 44% of sales.

[ILLUSTRATION OMITTED]

TOP	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG.
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A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

BRANDS	(\$MILLIONS)	VS.		(\$MILLIONS)	VS.		PRICE
		YEAR	AGO		YEAR	AGO	
Private label	\$95.8	0.0%	44.1%	37.5	-3.5%	\$2.55	
Dreyer's Grand Ice Cream	42.4	-2.7	19.5	10.8	-6.3	3.92	
Blue Bell Creameries	13.4	13.1	6.1	5.0	10.9	2.64	
Ciao Bella Gelato Co.	8.1	0.8	3.7	2.0	-3.2	3.92	
Kemp's	7.4	7.2	3.4	2.5	4.8	2.98	

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (\$MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (\$MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE	PER UNIT
Private label	\$95.8	0.0%	44.1%	37.5	-3.5%	\$2.55	
Haagen-Dazs	32.1	-3.4	14.8	8.2	-7.4	3.90	
Blue Bell	13.4	13.1	6.1	5.0	10.9	2.64	
Dreyer's Edy's	8.9	-12.9	4.1	2.2	-14.4	3.98	
Ciao Beta	8.1	0.8	3.7	2.0	-3.2	3.92	
Kemp's	7.4	7.2	3.4	2.5	4.8	2.98	
Wholefruit	5.7	-10.7	2.6	2.0	-8.0	2.77	
Prairie Farms	5.3	5.2	2.4	1.7	1.3	3.10	
Dean's	3.6	2.5	1.7	1.5	7.9	2.38	
Talenti	3.6	5.9	1.6	.8	3.1	4.38	
Category total	217.2	0.3		75.3	-1.7	2.88	

Source: SymphonyIRI Group

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Frozen Handheld Entrees (Non-breakfast)

The overall category was flat, but the top brands fared well. Sales for the top three (Hot Pockets, El Monterey and State Fair) were up 5.1%, 6.4% and 3.2% respectively. Smucker's Uncrustables was the biggest gainer, up 16.8%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHAKE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR AGO	AVG, PRICE PER UNIT
Nestle USA	\$948.9	-4.3	39.4%	315.5	-6.6%	\$3.01
Ruiz Food Products	268.8	5.3	11.1	90.9	-1.1	2.95
Hillshire Brands	190.0	5.6	7.9	30.9	6.4	8.14
Foster Poultry Farms	119.5	7.1	4.9	20.0	1.9	5.98
White Castle System	111.3	-3.1	4.6	20.6	-8.6	5.39

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHAKE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR AGO	AVG, RICE PER UNIT
Hot Pockets	\$637.8	5.1%	26.5%	189.0	2.5%	\$3.37
El Monterey	266.9	6.4	11.1	89.6	-0.5	2.98
Slate Fair	177.0	3.2	7.3	27.1	2.6	6.53
Lean Pockets	173.4	0.3	7.1	71.6	1.4	2.41
Foster Farms	119.4	7.2	4.9	19.9	1.9	5.98
White Castle	111.3	-3.1	4.6	20.6	-8.6	5.39
Smucker's Uncrustables	1084	16.8	4.5	24.8	10.2	4.42
Pnivate label	94.3	-7.6	3.9	40.0	14.8	2.36
Jose Ole	54.3	-4.9	2.2	39.4	2.6	1.38
Amy's	47.7	16.0	1.9	18.0	137	2.65
Category total	2,403.7	0.6		822.0	-1.9	2.92

Source: SymphonyIRI Group

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Frozen Pizza

Frozen pizza dollars and units were down 3.2% and 2.3% respectively. Two brands did enjoy success. Red Baron was up 6.3% and Jack's Original was up 2.9%. The DiGiomo brand accounted for 25% of market share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES	CHANGE	SHAKE	UNIT SALES	CHANGES	AVG,
	(MILLIONS)	VS.		(MILLIONS)	VS.	PRICE
		YEAR			YEAR	PER
Nestle USA	\$2,049.6	-3.1%	47.3%	478.5	-1.8%	\$4.28
Schwan Food Co.	896.8	-6.5	20.7	270.5	1.9	3.32
Private label	430.0	-3.4	9.9	143.1	-1.7	2.94
General Mills	366.0	-3.7	8.5	278.7	7.0	1.32
Pinnacle Foods Group	75.2	-0.7	1.7	72.5	0.4	1.04

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES	CHANGE	SHAKE	UNIT SALES	CHANGES	AVG,
	(MILLIONS)	VS.		(MILLIONS)	VS.	RICE
		YEAR			YEAR	PER
DiGiomo	\$1,095.6	-3.9%	25.3%	195.6	-4.6%	\$5.60
Red Baron	452.8	6.3	10.4	125.9	15.2	3.60
Private label	430.0	-3.4	9.9	146.1	-1.7	2.94
Tombstone	323.9	-2.3	7.4	90.5	1.9	3.58
Totino's Party Pizza	316.1	-3.1	7.3	237.7	-6.8	1.33
Jack's Original	188.7	2.9	4.3	66.7	4.4	2.83
California Pizza Kitchen	147.9	-14.0	3.4	29.7	-13.3	4.96
Freschetta	140.0	-12.4	3.2	27.3	-5.2	5.12
Tony's	102.4	-18.6	2.3	47.1	-9.0	2.17
Siouffef's	90.2	-3.0	2.0	31.2	-2.4	2.89
Category	4,326.9	-3.2		1,373.9	-2.3	3.15

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total

Source: SymphonyIRI Group

Frozen Pizza

Crust/Dough Home made pizza seems to be catching on. Dollars are up more than 60%. Units are up nearly 45%. Udi's outpaced the category, up 83.5% in dollars. Category leader Freschetta also did well, up 45.5% in dollars.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHAKE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR AGO	Avg. PRICE PER UNIT
Schwan Food Co.	\$7.2	45.4%	27.7%	1.8	41.6%	\$3.94
Private label	4.8	1,301.6	18.4	1.5	694.9	3.02
Udi's Denver Co.	3.7	83.5	14.3	.720	84.1	5.18
Kinnikinnick Foods	1.2	-1.1	4.9	.166	-2.6	8.30
Dolimex	.748	N/A	2.8	.150	N/A	4.98

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHAKE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR AGO	Avg. RICE PER UNIT
Freshetta	\$7.2	45.4%	27.7%	1.8	41.6%	\$3.94
Private label	4.6	1,301.6	18.4	1.5	694.9	3.02
Udi's	3.7	83.5	14.3	-72;	84.1	5.18
Kinnikinnick Foods	1.2	-1.1	4.9	.16	-2.6	8.30
Delimex	.74	N/A	2.8	-1.5	N/A	4.98
Tiaeo	.73	3.2	2.7	.42	4.0	1.71
House of Pasta	.70	-4.1	2.7	.26	5.4	2.68
Calise & Son's Bakery	.62	0.7	2.3	.42	0.9	1.49
Stefano's	.60	19.1	2.3	.34	17.6	1.78
Porteai	.60	24.8	2.3	.12	11.2	4.94
Category	26.0	60.9		7.9	44.9	3.27

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total

Source: SymphonyIRI Group

Liquid Laundry Detergent

Innovations in the detergent category have led to declines in liquid laundry detergent sales. Dollars are down 4.3% while units are down almost 6.0%. Tide is the brand leader with more than 30.0% of market share. Average unit price increased to \$7.38.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR	AVG. PRICE
					AGO	PER UNIT
Procter & Gamble	\$3,216.5	-4.7%	57.3%		-4.9%	-4.9% \$10.59
Church & Dwight Co.	854.3	5.1	15.2	177.8	0.1	4.80
Sun Products Corp.	826.0	-9.9	14.7	134.0	-12.1	6.16
The Dial Corp.	388.9	-3.5	6.9	79.3	-0.8	4.900
Private label	169.3	-11.3	3.0	27.3	-20.9	6.20

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR	AVG. PRICE
					AGO	PER UNIT
Tide	\$1,694.7	8.1%	30.2%	154.6	-8.5%	\$10.96
Gain	661.0	-0.4	11.6	87.9	0.0	9.72
All	320.6	-10.4	5.7	39.6	-15.7	8.08
Purex	276.0	0.5	4.9	57.3	-4.6	4.81
Arm & Hammer	272.1	-0.9	4.8	47.8	-11.7	5.69
Tide plus Febresee	207.5	2.3	3.7	15.7	-0.9	13.17
Xlra	186.7	0.5	3.3	52.6	1.6	3.54
Arm & Hammer Plus Oxi Clean	171.5	7.4	3.0	29.5	6.8	5.81
Private label	169.3	-11.3	3.0	27.3	-20.9	6.20

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All Oxi-active	143.2	8.2	2.5	20,2	3.2	7.07
Category total	5,604.4	-4.3		759.4	-5.9	7.38

Source: SymphonyIRI Group

Paper Towels

Procter & Gamble has a stronghold on paper towels. The manufacturer controls 44.4% of the category with its various Bounty brands. Private label is a distant second with 26.2% of dollars. Average unit price topped \$4.50 for the category.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHAKE AGO	UNIT SALES (MILLIONS)	CHANGES VS. YEAR	AVG. PRICE
Procter & Gamble	\$2,140.7	0.8%	44.4%	302.5	2.4%	\$7.07
Private label	1,262.1	0.8	26.2	470.1	-1.6	2.68
Georgia-Pacific Corp.	857.2	2.3	-17.8	161.6	4.0	5.30
Kimberly Clark Corp.	497.6	5.4	10.3	103.6	2.6	4.80
Marcal Paper Mills	19.5	-40.3	0.4	5.0	-35.8	3.89

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHAKE AGO	UNIT SALES (MILLIONS)	CHANGES VS. YEAR	AVG. PRICE
Private label	1,262.1	0.8	26.2	470.1	-1.6	2.68
Sparkle	487.9	5.0	10.1	107.7	8.6	4.53
Bounty Basic	296.6	-2.7	6.1	68.6	5.4	4.32
Kleenex Viva	261.3	2.7	5.4	55.3	-0.8	4.72
Scott	167.1	6.8	3.4	32.2	6.3	5.18
Brawny	167.3	5.3	3.2	26.9	0.1	5.83
Brawny Pick A	94.4	-18.8	1.9	20.3	-9.6	4.64

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Size

Marathon	82.8	16.5	1.7	2.9	14.0	27.76
Bounty	63.9	-14.6	1.3	7.7	-22.6	8.31
Extra						
Soft						

Category	4,816.8	1.3		1,068.5	-1.0	4.51
total						

Source: SymphonyIRI Group

Toilet Tissue

The big three toilet tissue manufacturers (Georgia-Pacific, Procter & Gamble and Kimberly Clark) were separated by less than 4.0%. Yet private label was tops on the brand side, up an impressive 9.4% in dollars versus a year ago.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR	AVG. PRICE
					AGO	PER UNIT
Georgia-Pacific Corp.	\$2,384.5	-2.3%	26.5%	386.5	-5.8%	\$6.17
Procter & Gamble	2,318.5	0.8	27.7	255.8	-1.6	0.06
Kimberly Clark Corp.	2,079.6	2.1	24.8	306.1	-2.3	6.79
Private label	1,442.8	9.4	17.2	407.8	4.5	3.54
Marcal Paper Mills	43.2	-10.6	0.5	10.2	-25.1	4.22

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGES VS. YEAR	AVG. PRICE
					AGO	PER UNIT
Private label	1,442.8	9.4%	17.2%	407.8	4.5%	\$3.54
Angel Soft	1,300.0	-1.5	15.5	256.2	-5.0	5.07
Charmin Ultra Soft	1,025.6	3.2	12.2	103.3	-2.1	9.93
Scott	985.7	-0.9	11.8	155.0	6.7	6.36
Charmin Ultra	904.3	0.9	10.8	91.4	-0.8	9.89

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Strong

Quilted Northern Soft & Strong	682.6	0.4	8.1	64.1	-3.6	6.12
Kleenex Cottonelle Clean Care	432.7	78.1	5.1	60.6	73.6	7.14
Charmin Basic	342.2	-6.4	4.1	55.3	-9.0	6.18
Kleenex Cottoneille Ultra	306.6	7.6	3.6	39.1	9.9	7.83
Quilted Northern Ultra Plush	252.5	-9.9	3.0	35.0	-11.4	7.21
Category total	8,356.6	1.4		1,397.8	-1.6	5.98

Source: SymphonyIRI Group

Fresh Eggs

Store brands rule the roost when it comes to fresh eggs, controlling more than 50% of the \$4.7 billion category Eggland's Best is the best of the rest, with almost 12% of dollars. Egglands dollars were also up an impressive 13.4%

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$2,528.2	0.4%	53.8%	1,212.3	-1.1%	\$2.09
Eggland's Best	571.3	13.3	12.2	181.6	7.4	3.15
Country Creek Farma	389.4	4.7	8.3	168.9	0.7	2.30
Cal Maine Foods	147.6S	13.0	3.1	S2.2	12.6	2.83
Sunny Farms Corp.	113. 8	-9.5	2.4	54.6	-11.8	2.09

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

						UNIT
Private label	\$2,528.2	0.4%	53.8%	1,212.3	-1.1%	\$2.09
Eggland's Best	559.8	13.4	11.9	177.8	7.6	3.15
Great Day Farmers Market	193.4	-3.4	4.1	96.0	-5.1	2.01
Country Creek	129.2	7.6	2.8	50.6	7.3	2.56
Sunny Farms	113.8	-9.5	2.4	54.6	-11.5	2.09
Cal Maine Sunup	105.7	6.7	2.3	38.6	8.9	2.74
Land O'Lakes	62.7	-2.5	1.3	19.4	-0.8	3.23
Sauder's Eggs	53.3	-0.9	1.1	16.9	-8.2	2.62
Hi Man dale Farms	4Q.1	25.2	1.0	26.2	23.4	1.87
Dutch Farms	43.6	165.8	0.9	27.3	185.6	1.60
Category total	4,695.5	3.0		2,074.5	0.2	2.26

Source: SymphonyIRI Group
Refrigerated Skim/Lowfat Milk
Skim/lowfat milk sales reached nearly \$10 billion yet were down 3%versus last year. Like whole milk, private label controlled the category with 63.4% of dollar share.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGEVS YEAR AGO	AVG. PER UNIT
Private label	\$6,170.5	-3.2%	63.4%	2,160.8	-3.0%	\$2.86
H P Hood	393.7	-1.5	4.0	100.6	-3.2	3.91
Dean Foods Co.	353.6	-1.9	9	123.7	-2.0	2.66
White wave Foods Co.	313.7	3.0	3.2	68.6	-2.1	4.56

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Prairie Farms Dairy	166.4	0.6	1.7	59.5	0.6	2.80
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Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$6,170.5	-3.2%	63.4%	2,160.8	-3.0%	\$2.86
Horizon Organic	311.6	4.4	3.2	68.2	-0.8	4.67
Hood Lactaid	307.8	0.7	3.2	72.3	-1.0	4.26
Prairie Farms	149.8	2.0	1.5	53.2	2.0	2.82
Dean's	136.9	-3.1	1.4	40.7	-3.0	2.7B
Land O'Lakes	123.6	0.6	1.3	43.2	-0.3	2.86
Organic Valley	96.3	2.9	1.0	22.5	-1.6	4.29
Hiland	90.1	0.5	0.9	30.1	0.0	2.99
Alta Dena	68.1	31.1	0.7	21.4	33.8	3.18
Country Fresh	66.9	-8.2	0.7	23.0	-7.9	2.91
Category total	9,730.4	-3.0		3,286.4	-3.2	2.96

Source: SymphonyIRI Group
Refrigerated Whole Milk

Private label has "Got Milk" covered. Store brands account for more than 60.0% of whole milk sales. However, both dollars (-3.1) and units (-3.0) were down. The top brand was Horizon Organic. Average price per unit topped \$3.00.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$2,359.4	-3.1%	61.3%	794.9	-3.0%	\$2.97
White wave Foods	133.2	7.5	3.5	29.6	3.3	4.50

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Co.

Dean Foods Co.	113.9	1.0	3.0	36.4	1.6	2.07
H P Hood	96.3	0.2	2.5	24.4	-0.7	3.94
Milk Products	82.9	7.4	2.2	27.2	9.9 .	3.04

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$2,359.4	-3.1%	61.3%	794.9	-3.0%	\$2.97
Horizon Organic	133.0	8.7	3.5	29.6	4.4	4.50
Hood Lactaid	75.0	1.2	1.9	17.0	0.7	4.41
Borden	61.6	14.4	1.6	20.1	19.1	3.05
Hiland	54.1	3.7	1.4	18.0	4.2	3.01
Prairie Farms	49.1	6.6	1.3	17.1	7.4	2.87
Dean's	44.1	-3.2	1.1	15.9	-3.6	2.77
Oak Farms	41.1	27.0	1.1	13.2	26.2	3.10
Country Fresh	39.4	-4.8	1.0	12.5	-2.8	3.16
Land O'Lakes	34.6	0.5	0.9	11.7	0.4	2.95
Category total	3,850.6	-1.7		1,266.3	-1.7	3.04

Source: SymphonyIRI Group

Frozen Cooked Shrimp

One of the most popular foods in the frozen case, shrimp dollars were down 1.6%, though units were up slightly. Store brands accounted for almost 60% of dollars. despite the average price of \$7.68 was higher than the category average, \$7.53.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
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Private label	\$682.0	-10.3	58.1%	88.8	-7.7%	\$7.68
Rich-Seapak Corp.	101.5	15.8	8.6	16.3	6.5	6.22
National Fish & Seafood	62.9	89.1	6.3	9.6	107.5	6.59
Tampa Bay Fisheries	34.3	15.9	2.9	2.0	42.1	16.50
Aqua Star	32.9	20.1	2.8	4.6	40.8	7.16

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$682.0	-10.3%	58.1%	88.8	-7.7%	\$7.66
Seapak	101.5	15.8	8.6	16.3	6.5	8.22
Nobrand	81.0	97.2	5.2	9.2	116.9	6.59
Aqua Star	31.6	19.6	2.7	4.4	41.1	7.04
Nobrand	30.7	7.9	2.6	1.5	8.9	20.38
Chicken of the Sea	276	149.6	2.3	5.0	179.3	5.51
Sea Best	22.9	-4.6	1.9	3.1	-11.7	7.26
Cape Gourmet	14.8	5.4	1.2	.93	-3.8	15.98
Gorton's Shrimp Temptations	14.3	-0.3	1.2	2.3	-2.3	6.06
Margaritaville	11.7	26.9	1.0	1.9	18.7	6.16
Category total	1,172.1	-1.6		155.5	0.7	7.53

Source: SymphonyIRI Group

Frozen Dinners/Entrees (Single-serve)

The category was down in both units (-4.8%) and dollars (-2.2%). Nestle and ConAgra were the top players with 32.3% and 29.8% market share respectively.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Nestle USA	\$1.497.6	-1.5%	32.3%	580.7	-2.8%	\$2.58

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

ConAgra Foods	1,363.4	-6.0	29.8	766.6	-10.3	1.80
Heinz Frozen Foods	532.8	-4.1	11.4	240.1	-5.0	2.22
Bellisio Foods	265.5	1.8	5.7	262.4	2.2	1.01
Pinnacle Foods Group	206.1	-0.2	4.4	75.1	-0.4	2.74

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	AVG. PRICE PER UNIT
Stouffer's	\$536.0	-2.7%	11.5%	197.7	-4.4%	\$2.71
Weight Watchers Smart Ones	415.3	1.3	8.9	194.7	0.3	2.13
Banquet	360.6	-11.8	7.7	352.3	-16.4	1.02
Marie Callender's	327.2	6.1	7.0	124.0	8.1	2.64
Stouffer's In Csne Smpl Fvriltes	266.4	55.9	5.7	123.4	66.0	2.16
Stopfer's In Csne Clnary Cllctn	255.2	1,044.2	5.5	96.5	854.3	2.64
Healthy Choice	171.4	-1.8	3.7	77.7	-2.0	2.20
Hungry Man	129.3	-16.0	2.7	46.1	-13.7	2.66
Healthy Choice Cafe Steamers	106.9	-37.6	2.3	40.1	-36.7	2.66
Healthy Choice Cmplt Slections	105.6	-15.1	2.2	41.8	-12.9	2.53
Category total	4,637.1	-2.2		2,188.8	-4.8	2.12

Source: SymphonyIRI Group
Frozen Dinners/Entrees (Multi-serve)

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

It seems as if parents are looking away from the frozen case to feed the family. The category is down 6.2% in dollars and 9.2% in units. Top brand Stouffer's (32.1% market share) held its own, remaining relatively flat.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	Avg. Price per unit
Nestle USA	\$840.3	-3.4%	39.6%	119.2	-6.3%	\$7.05
Unilever Bestfoods Nrh Amrica	336.5	-15.2	15.8	47.6	-14.0	7.07
Bird's Eye Foods	224.7	-0.4	10.6	51.1	-5.1	4.39
Con Agra Foods	156.2	5.1	7.3	36.0	-13.5	4.30
Private label	127.4	-5.1	6.0	18.2	-10.7	6.98

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLONS)	CHANGEVS YEAR AGO	Avg. Price per unit
Stouffer's	\$661.5	0.3%	32.1%	88.9	-3.0%	\$7.80
Bird's Eye Vcila	224.4	-0.3	10.6	51.1	-5.0	4.39
Bertolli	180.9	-9.9	8.5	26.6	-7.5	6.78
P F Chang's Home Menu	128.3	-8.0	6.0	16.5	-7.0	7.76
Private label	127.4	-5.1	6.0	18.2	-10.7	6.98
Marie Callender's	87.9	14.8	4.1	14.0	-6.9	5.89
Stouffer's Easy Express Skillets	67.3	-7.1	3.1	18.2	-6.4	4.14
Michael Angelo's	63.8	13.8	3.0	7.2	6.3	8.80
Banquet	58.2	-5.6	2.7	20.0	-18.8	2.91
Gourmet	51.2	53.6	3.4	11.1	72.6	4.81

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Dining

Category total	2,118.1	-6.2	351.7	-9.2	6.02
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Source: SymphonyIRI Group
Baby Formula (Ready-to-Drink)

Though the category struggled (-6.4% in dollars, -18.9% in units) some brands enjoyed solid gains. Gerber Good Start Gentle dollars were 437%, primarily because of its \$10.10 price point, more than \$2.00 above category average.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Abbott Nutrition	\$158.6	-8.2%	60.9%	19.3	-22.6%	\$8.21
Mead Johnson Nutrition	85.1	-10.0	32.6	12.7	-16.1	6.69
Gerber Products Co.	15.8	63.6	6.1	1.6	16.4	9.68
Private label	1.0	-274	0.4	0.2	-28.6	6.40
Nestle Healthcare Nutrition	.069	10.7	0.0	.013	2.5	5.11

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Similac Advance	\$73.8	-1.3%	28.3%	8.6	-11.4%	\$8.55
Enfamil Premium	64.6	-5.9	24.8	10.1	-13.4	6.41
Similac Sensitive	36.1	13.0	14.6	5.2	1.6	7.39
Similac Expert Care Alimentum	17.9	8.9	6.9	1.9	3.2	9.49
Gerber Good Start Gentle	13.9	437.1	5.3	1.4	242.4	10.10

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Similac isomil	10.9	59.0	4.2	1.6	47.8	6.67
Enfamil Gent lease	10.2	53.6	3.9	1.2	37.9	8.23
Similac Sensitive R S	6.0	-71.6	2.3	.92	-79.7	6.54
Similac	4.9	70.0	1.9	.30	320.1	16.30
Similac Neosure Advance	4.9	3.6	1.9	.62	-0.6	7.84
Category Total	260.6	-6.4		33.8	-18.9	7.70

Source: SymphonyIRI Group

Baby Formula (Powder)

Abbott Nutrition overtook Mead Johnson at the top of the manufacturer list with a 9.8% boost in sales of its Similac products. The category's biggest gainer was Gerber Good Start Gentile, up almost 85%. Overall, dollars were up 4.7%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Abbott Nutrition	\$1,349.9	9.8%	37.9%	747	2.3%	\$18.07
Mead Johnson Nutrition	1,327.5	-1.1	37.3	68.0	-6.8	19.51
Gerber Products Co.	665.3	7.4	18.7	41.5	0.4	16.04
Private label	201.5	2.5	57	12.4	-3.5	16.21
The Hain Celestial Group	7.3	38.5	0.2	0.3	367	29.01

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Enfamil Premium	\$603.6	4.8%	17.0%	33.3	-0.8%	\$18.14

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Similac Advance	505.6	6.4	14.2	31.4	2.6	16.09
Gerber Good Start Gentle	438.2	84.9	12.3	27.9	80.0	15.69
Similac Sensitive	418.2	25.0	11.7	23.6	18.2	17.73
Enfamil Gentle	271.9	9.4	7.8	13.6	3.0	20.03
Private label	201.5	2.5	5.7	12.4	-3.5	16.21
Sirms, Advance Early Shield	146.7	10.8	4.1	6.2	3.3	23.76
Enfamil Nutramigen Lipil	114.9	14.4	3.2	4.4	6.8	25.97
Enfagrow Premium	109.4	-17.6	3.1	4.8	-19.6	22.64
Enfamil Prosobee	96.7	12.8	27	5.1	7.5	18.69
Category Total	3,560.1	4.7		197.2	-1.6	18.05

Source: SymphonyIRI Group
Convenience/PET Still Water

Nestle Waters NA stable of brands (Nestle-Pure Life, Poland Spring, Deer Park and Ozarka) earned it the top vendor spot with 33.2% of dollars. Private label was the biggest individual brand at 23.2%, up 17%. versus last year.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Nestle Waters North America	\$2,168.4	1.5%	33.2%	620.8	0.8%	\$3,49
Private label	7,519.7	17.0	23.2	563.3	15.1	2.75
Glaceau Water Co.	698.0	-1.3	10.7	469.3	87	1.43
Coca Cola Co.	564.6	9.7	8.6	208.5	8.0	2.71

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PepsiCo	552.2	17	8.4	193.0	-0.5	2.86
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Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVE PRICE PER UNIT
		AGO			AGO	
Private label	\$1,519.7	17.0%	23.2%	553.3	15.1%	\$2.75
Nestle Pure Life	748.8	-1.2	11.5	199.0	-3.0	3.76
Dasani	558.8	9.6	8.5	206.1	7.7	2.71
Aquafina	534.4	3.5	8.2	186.8	1.3	2.86
Poland Spring	407.7	1.7	6.2	124.6	-2.6	3.27
Glaceau Vitamin Water	311.8	11.5	4.8	243.4	-15.7	1.28
Deer Park	246.8	0.5	3.8	64.1	-0.2	3.85
Ozarka	207.3	-0.3	3.2	56.4	-1.2	3.68
Glaceau Smart Water	194.3	14.2	3.0	103.4	7.7	1.88
Glaceau Vitamin Water Zero	191.9	4.0	29	142.6	5.8	1.35
Category Total	6,538.5	4.3		2,580.3	0.4	2.53

Source: SymphonyIRI Group
Licorice Box/Bag

Top brand Twizzlers was up 3.0% in dollars, though down 3.2% in units. However, Twizzlers Pull n' Peel more than picked up the slack, up 17.0% in dollars and 11.1% in units. Category dollars were up 2.7%. Units were down 1.7%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVE PRICE PER UNIT
		AGO			AGO	
The Hershey Co.	\$278.4	4.0%	74.6%	144.2	1.5%	\$1.93

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American Licorice Co.	51.9	-6.1	13.9	25.5	-8.1	2.04
Foreign Candy Co.	7.6	15.6	2.1	5.7	16.0	1.36
Private label	7.6	-21.0	2.0	4.8	-22.6	1.60
Danell Lea Chocolate Shops Fly	6.7	37.5	1.8	2.5	43.9	2.72

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Twizzlers	\$205.1	3.0%	55.0%	100.6	-3.2%	\$2.04
Red Vines	475	-6.4	12.7	23.0	9.0	2.07
Twizzlers Pull n' Peel	34.8	17.0	9.3	16.4	11.1	2.12
Good & Plenty	22.9	-0.9	6.2	19.2	-0.2	1.19
Twizzlers Cherry Kick	6.9	-0.4	2.4	4.3	8.3	2.07
Private label	7.6	-21.0	2.0	4.3	-22.6	1.60
Rips	7.1	14.9	1.9	4.9	15.3	1.44
Darrell Lea	6.7	37.5	1.8	2.5	43.9	2.72
Darrell Lea Nibs	6.6	11.0	1.8	3.6	4.7	1.82
Lucky Country	3.6	17.9	1.0	1.4	25.6	2.59
Category Total	373	2.7		193.1	-1.7	1.93

Source: SymphonyIRI Group
Non-Chocolate Chewy Candy

Sour has never been sweeter. Sour Patch Kids was the category's biggest gainer, up 16.6% in dollars and 18.8% in units. Skittles and Starburst were the top national brands, with 8.3% and 6.9% market share respectively. Store brands topped the category with 12.1% market share, up 6.5%.

[ILLUSTRATION OMITTED]

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Mars	\$385.1	3.1%	22.6%	195.4	-2.1%	\$1.97
Private label	205.5	6.5	12.1	163.7	4.0	1.26
Kraft Foods	1677	11.2	11.0	100.6	137	1.67
The Hershey Co.	127.6	0.2	7.6	90.7	-37	1.41
Parley's & Salthers Candy Co.	99.7	-11.6	5.9	66.8	-12.3	1.45

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Private label	\$205.5	6.5%	12.1%	163.7	4.9%	\$1.26
Skittles	140.8	6.3	8.3	76.3	0.2	1.85
Starburst	117.1	-4.0	5.9	61.6	-8.9	1.90
Sour Patch Kids	73.6	16.6	4.3	41.9	18.8	1.75
Reese's Pieces	66.1	-3.7	3.9	46.6	-0.9	1.42
Swedish Fish	58.1	4.1	3.4	26.9	3.1	2.01
Life Savers Gummies	51.2	-15.0	3.0	29.3	-23.5	1.75
Skittles and Starburst	51.1	137	3.0	7.7	46.6	6.61
Tootsie Roll	49.0	-2.6	2.8	20.6	-10.6	2.33
Haribo Gold	44.8	16.1	2.6	30.1	84	1.49

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Bears

Category	1,701.3	2.8	1,100.7	-0.7	1.55
Total					

Source: SymphonyIRI Group

Sugar-Free Diet Candy

More consumers may be watching their sugar intake, but they are not turning to sugar-free candy. The category was down almost 5% in dollars and more than 9% in units. Overall the category generated \$110 million.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Storck USA	\$32.7	5.8%	29.7%	15.5	3.5%	\$2.11
Wm Wrigley Jr. Co.	22.4	-7.4	20.4	12.5	8.1	1.79
The Hershey Co.	10.1	4.6	0.1	4.9	5.2	2.05
Farley's A Sathers Candy Co.	8.1	17.8	.74	4.3	6.8	1.87
Private label	7.8	11.4	7.1	6.0	-4.6	1.30

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVE PRICE PER UNIT
Werther's Original	\$32.7	5.8%	29.7%	15.5	3.5%	\$2.11
Life Savers	22.4	-7.1	20.4	12.6	-7.7	1.79
Private label	7.8	11.4	7.1	6.0	-4.6	1.30
Brach'e	4.8	37.1	4.4	2.4	29.0	1.96
Ice Breakers	4.1	-6.2	3.7	2.2	-3.2	1.91
Jolly Rancher	4.0	24.6	3.6	1.8	22.4	2.16
Russell	3.6	53.2	3.3	1.8	68.4	1.99

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Stover

Too Tarts	3.4	-11.3	3.1	2.2	-23.1	1.56
SmartChoice						
Halls	3.2	-67.4	2.9	1.9	64.2	1.68
Refresh						
Nips	3.2	-16.3	2.9	1.6	-19.3	1.80
Category	110.1	-4.7		60.8	-9.3	1.81
Total						

Source: SymphonyIRI Group

Chocolate Candy Box/ Bag/Bar > 3.5 ounces

With sales up 6.3% versus last year, Hershey's remains the top vendor with more than 40% of dollars. However, the top brand was Mars' M&M's, with 15% market share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT
The Hershey Co.	\$1,663.5	6.3%	40.2%	628.7	0.9%	\$2.65
M&M	1,175.4	6.9	28.4	256.9	6.0	4.57
Nestle USA	306.9	8.9	7.4	152.3	-4.0	2.02
Lindt & Sprungli A.G.	211.6	6.9	5.1	66.3	2.6	3.20
Ghirardelli Chocolate Co.	149.2	20.4	3.6	46.1	19.9	3.24

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT
M & M's	\$620.1	5.7%	15.0%	138.7	2.2%	\$4.47
Hershey's	293.2	2.8	7.1	107.4	-4.6	2.73
Reese's	231.2	-0.6	5.6	55.2	-6.1	4.19
All Hershey's products	174.3	12.8	4.2	24.9	-0.1	7.01
Hershey's Kisses	170.8	8.5	4.1	41.6	2.9	4.11
Dove	136.2	7.6	3.3	37.4	6.8	3.64

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Promises

Snickers	133.4	4.7	3.2	19.8	8.4	6.72
All Mars' products	122.0	6.7	2.9	16.0	9.5	7.64
Hershey's Nuggets	116.9	8.7	2.8	28.0	6.5	4.18
Lindt Lindor	113.1	0.7	2.7	30.3	-5.1	3.73
Category total	4,142.5	7.0		1,395.0	1.3	2.97

Source: SymphonyIRI Group

Chocolate Candy Snack Size

Snickers (13.4%) gave up the top spots to Reese's (13.7%), with Kit Kat (11.1%) a close third. The category suffered with units, down 9.0%, though dollars were only down 1.8%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT
The Hershey Co.	\$643.7	-3.7%	50.0%	307.9	10.9%	\$2.11
Mars	537.8	1.5	41.4	237.7	B.5	2.26
Nestle USA	105.2	8.6	8.1	36.2	3.4	2.91
Tootsie Roll Industries	2.6	35.0	0.2	1.0	24.0	2.61
Just Born	1.4	43.2	0.1	0.5	35.1	2.96

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT
Reese's	\$1779	-4.3%	13.7%	98.8	-14.6%	\$1,80
Snickers	173.9	-6.9	13.4	81.1	-15.3	2.15
Kit Kat	144.3	4.7	11.1	74.7	-8.2	1.93
All Hershey's products	96.0	-30.0	7.4	10.5	-38.2	9.11
Hershey's	93.1	15.6	7.2	47.3	-3.3	1.97
All Mars' products	85.3	2.9	6.6	10.0	1.0	8.54

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

M&M's	79.3	6.9	6.1	39.9	0.6	1.99
Milky Way	77.8	114	6.0	43.9	11.0	1.77
Peter Paul Almond Joy	59.1	-27	4.5	33.6	-15.4	1.78
Twix	58.1	-77	4.5	33.0	-16.1	1.76
Category total	1,298.3	-1.8		584.3	-9.0	2.22

Source: SymphonyIRI Group

Hard Sugar Candy/ Pkg & Roll Candy

Hard sugar was on a roll last year. Dollars were up 14.3% and units up 17.0%. Top brand Werther's outpaced the category, up more than 22%. Overall, eight of the top ten brands were up for the year.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE	
					VS. I TEAR AGO	VS. I TEAR AGO
The Hershey Co.	\$104,4	39.4%	20.4%	49.7	55.9%	\$2.10
Storck USA	80.8	22.4	15.8	39.8	16.5	2.03
Tootsie Roll Industries	55.8	3.1	10.9	24.6	0.0	2.27
Spangler Candy Co.	49.6	715	9.7	13.7	3.8	3.62
Charms	40.6	-3.0	7.9	31.0	-7.7	1.31

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE		AVC PRICE PER UNIT
					VS. I TEAR AGO	VS. I TEAR AGO	
Werther's Original	\$80.8	224%	15.8%	39.8	16.5%	\$2,03	
Jolly Rancher	790	6.7	15.5	32.0	2.7	2.46	
Spangler Dum Dum Pops	38.2	6.6	7.5	9.7	5.0	3.93	
Private label	37.9	16.8	7.4	33.6	12.9	1.13	
Charms Blow Pop	35.6	-3.8	7.0	24.3	-9.6	1.46	

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Tootsie Roll Pops	30.1	-6.9	5.9	13.3	-9.1	2.26
Life Severs	287	2.1	5.6	14.4	-5.0	2.00
Jolly Rancher Crunch 'N Chew	25.4	2,947.3	5.0	17.6	2,599.1	1.44
Nips	22.1	18.2	4.3	21.2	17.4	1.04
Original Gourmet	20.8	88.4	4.1	42.2	89.0	0.49
Category total	510.5	14.3		331.0	17.0	1.54

Source: SymphonyIRI Group

Granola Bars

General Mills and Quaker Oats are the top vendors, capturing 38.5% and 25.9% of market share respectively. Quaker did close the gap, up 6.9% in dollars and 10.6% in units while General Mills was down 4.4% in dollars and 9.9% in units.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT
General Mills	\$636,0	-4.4%	38.5%	177.5	-0.9%	\$3.56
Quaker Oats Co.	428.1	6.9	25.9	157.7	10.6	2.71
Private label	173.0	13.6	10.5	76.7	10.7	2.26
Kashi Co.	105.2	12.2	6.4	32.2	12.2	3.27
Kellogg Co.	96.1	-11.7	5.9	31.8	-9.2	3.09

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT
Nature Valley	\$386.5	-0.2%	23.4%	107.3	-7.0%	\$3.60
Quaker Chewy	230.1	-5.7	13.9	79.4	-7.0	2.90
Nature	179.3	-1.2	10.9	51.8	-8.1	3.46

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Valley						
Sweet &						
Salty						
Nut						
Private label	173.0	13.8	10.5	76.7	10.7	2.26
Quaker Chewy Dippes	115.4	28.2	7.0	42.0	324	275
Kashi TLC	95.1	1.5	5.8	29.3	2.3	3.24
Kelloggs Fiber Plus	70.6	-34.3	4.3	21.9	-35.0	3.22
Nature Valley Chewy Trail Mix	57.4	-28.5	3.5	14.2	34.5	4.05
Quaker Chewy 90 Cat	43.9	-25.4	27	17.1	-13.3	2.57
Sunbelt	43.4	-48.9	2.6	21.3	-50.9	2.04
Category total	1,651.9	1.2		556.3	-0.4	2.97

Source: SymphonyIRI Group

Salad Dressing Mixes

HV Foods and its Hidden Valley Ranch brand control more than half of the category. The only other significant player is Kraft and its Good Seasons brand. Private label grew by almost 19% but still only accounted for 4.2% of market share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. I TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I TEAR AGO	AVC PRICE PER UNIT	
				UNIT SALES			
				(MILLIONS)	PER UNIT		
HV Food Products Co.	\$73.5	6.8%	54.9%	31.3	4.5%	\$2.35	
Kraft Foods	53.0	-0.5	39.6	21.1	-0.4	2.51	
Private label	5.6	18.9	4.2	4.5	30.1	1.25	
Uncle Dan's	1.4	3.4	1.0	.58	2.0	2.39	
Unilever Bestfoods North	0.3	10.6	0.1	.07	13.6	2.85	

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

America

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. I YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I YEAR AGO	AVC PRICE PER UNIT
Hidden Valley Ranch	\$73.5	6.8%	54.9%	31.3	4.5%	\$2.35
Good Seasons	63.0	-0.5	39.6	21.1	-0.4	2.51
Private label	5.6	18.9	4.2	4.5	30.1	1.25
Uncle Dan's	1.4	3.4	1.0	.58	2.0	2.39
Knorr	.19	1.14	0.1	.08	14.2	2.85
J & D's	.10	9.2	0.1	.06	11.2	1.74
Simply Organic	.07	2.6	0.1	.06	2.2	1.52
Naturally Fresh	.06	22.4	0.1	.07	18.0	0.77
Braswell's	.03	0.4	0.1	.02	14.6	1.67
The Chef in Black	.02	-17.6	0.1	.01	-3.8	2.33
Category total	134.0	4.2		57.8	4.1	2.32

Source: SymphonyIRI Group

Shelf Stable Pourable Salad Dressings

Strore brands continue to gain market share, up 8.8% in dollars. Kraft still held the top brand, but was down 6.2%. Category sales nearly reached \$2 billion, up 3.3%. Units were relatively flat.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS. I YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I YEAR AGO	AVC PRICE PER UNIT
HV Food Products Co.	\$437.3	6.7%	22.1%	112.1	2.4%	\$3.90
Kraft Foods	405.0	-6.7	20.5	181.3	5.8	3.23
Private label	320.1	8.8	18.2	170.1	3.3	1.88

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Unilever 256.3 1.0 13.0 115.6 -1.2 2.22

Bestfoods
Nrth
America

Ken's 205.4 5.2 10.4 94.2 4.9 2.18
foods

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS. I	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. I	AVC PRICE
						PRICE
						PER
Kraft	\$346.7	-6.2%	17.6%	154.8	-67%	\$2.24
	320.1	8.8	16.2	170.1	3.3	1.88
	231.5	2.1	11.7	104.5	0.3	2.22
	187.7	3.6	9.5	84.4	2.8	2.22
	57.4	9.0	2.9	16.5	67	3.49
	38.8	-9.2	2.0	10.9	-11.1	3.57
	Brianna's	29.8	3.7	1.6	8.1	3.36
	Girard's	20.4	-1.6	1.0	5.2	3.97
	Kraft Free	20.3	-7.6	1.0	9.1	2.24
	Category total	1,978.3	3.3	793.6	0.3	2.49
						,

Source: SymphonyIRI Group
Cheese Snacks

Cheese snack sales were off last year, down 4.6% in dollars and 8.7% in units. The Cheetos brand owned the category with nearly 75% of market share. Utz and store brands each captured 4.1% of category sales, both down for the year.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVG PRICE PER UNIT
Frito-Lay	\$885.4	-4.9%	79.5%	458.9	-9.8%	\$1.93
Utz Quality Foods	46.6	-4.3	4.2	15.2	-4.9	3.06

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Private label	45.9	-13.3	4.1	25.6	-15.4	1.79
Wise Foods	27.7	13.2	2.5	17.6	21.4	1.57
Herr Foods	12.2	41.1	1.1	7.7	37.6	1.59

Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price
Cheetos	\$832.1	0.5%	74.7%	443.4	-5.5%	\$1.88
Private label	45.9	-13.3	4.4	25.6	-15.4	1.79
Utz	45.3	-6.9	4.1	15.0	-6.3	3.02
Baked Cheetos	28.6	-11.6	2.6	8.3	-12.8	3.46
Wise Cheez Doodles	26.6	9.8	2.4	17.1	18.7	1.56
Cheetos Natural	13.2	-39.8	1.2	3.7	-38.0	3.54
Herr's	12.2	41.2	1.1	7.7	37.5	1.59
Golden Flake	10.8	22.8	1.0	8.2	25.0	1.32
Cheetos Simply Natural	7.8	N/A	0.7	2.3	N/A	3.46
Robert's American Gourmt Smer Pffs	7.5	10.6	0.7	2.3	3.4	3.25
Category total	1,114.4	-4.6		576.3	-8.7	1.93

Source: SymphonyIRI Group
Potato Chips

Four of the top six brands belong to Frito-Lay, which controls nearly 60% of the potato chip category. However, Procter & Gamble's Pringles was the biggest gainer with dollars up 13.8%. Overall sales surpassed \$5 billion, up 3.5% versus last year.

[ILLUSTRATION OMITTED]	TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	Avg Price PER UNIT
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A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

		AGO			AGO		
Frito-Lay	\$3,137.1	2.2%	58.9%	1,281.5	-1.3%	\$2.45	
Procter & Gamble	593.4	10.7	11.14	350.7	12.3	1.69	
Private label	420.3	6.9	7.9	211.7	3.9	1.99	
Utz Quality Foods	205.9	5.7	3.9	110.1	4.4	1.87	
Cape Cod Potato Chip	147.0	11.5	2.8	48.1	7.7	3.06	

Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price	Per Unit
Lays	\$1,521.4	3.8%	28.6%	656.6	-0.9%	\$2.32	
Ruffles	506.3	1.0	9.5	192.1	-3.8	2.64	
Pringles	447.9	13.8	8.4	301.5	14.7	1.49	
Wavy Lays	423.0	2.9	7.9	153.5	-1.1	2.76	
Private label	420.3	6.9	7.9	211.7	3.9	1.99	
Lays Kettle Cooked	262.9	10.2	4.9	96.0	9.8	2.74	
Utz	170.2	3.1	3.2	95.8	2.6	1.78	
Cape Cod	147.0	11.5	2.8	48.1	7.7	3.06	
Kettle	145.3	-0.2	2.7	54.6	-0.5	2.66	
Baked Lays	101.8	-16.2	1.9	31.1	-16.0	3.27	
Category total	5,325.0	3.5		2,380.5	1.4	2.24	

Source: SymphonyIRI Group
Tortilla/Tostada Chips

Consumer favorite Doritos nearly doubled runner-up Tostitos (34.2% to 17.3%). Tostitos Scoops was a top gainer, up 10.6% in dollars. Overall the category generated \$3.5 billion in dollars, up 4.6%. Units sales were relatively flat, up 0.7%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price	Per Unit

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Frito-Lay	\$2,595.7	2.3%	73.7%	966.5	-2.0%	\$2.69
Private label	189.6	8.0	5.4	103.4	3.5	1.83
Mission Foods	123.1	0.8	3.5	44.7	-0.8	2.75
Truco Enterprises	113.4	55.7	3.2	37.6	56.7	3.02
Bimbo Bakeries USA	75.7	44.2	2.1	37.7	30.5	2.01

Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG PRICE PER UNIT
Doritos	\$1,204.1	-1.0%	34.2%	492.0	-8.2%	\$2.45
Tostitos	610.8	-3.8	17.3	189.1	-4.2	3.23
Tostitos Scoops	393.4	10.6	11.2	117.6	11.2	3.34
Santitas	230.7	-1.4	6.5	112.6	-3.1	2.05
Private label	189.6	8.0	5.4	103.4	3.5	1.83
Mission	121.0	0.7	3.4	44.3	-0.8	2.73
On The Border	112.9	60.0	3.2	37.2	63.4	3.03
Batcel Takis Fuego	62.1	52.1	1.8	31.0	33.8	2.00
Doritos Jacked	51.1	4,337, 848, 234.5	1.5	19.7	1,826, 844, 803.3	5.29
Calidad	35.3	-2.1	1.0	22.0	-2.9	1.60
Category total	3,523.4	4.6	-	1,353.9	0.7	2.60

Source: SymphonyIRI Group
Noodles

With more than 26.0% of market share, private label topped the noodles category. The entire category was flat (-0.7%) in dollars, yet units were down 4.5%. Average price per unit was under \$2.00, though up 5-cents versus last year.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG PRICE
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A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

	(MILLIONS)	VS.		(MILLIONS)	VS.	PER UNIT
		YEAR			YEAR	
		AGO			AGO	
Private label	\$62.8	1.5%	26.9%	38.4	-0.9%	\$1.63
New World Pasta	40.9	3.0	17.5	20.7	-3.2	1.98
Strom Products	40.4	-5.0	17.3	19.7	-12.8	2.05
American Italian Pasta Co.	25.4	-11.5	10.9	13.6	-11.1	1.87
Dutch Corp	6.8	-5.4	2.9	2.2	-7.2	3.06

Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	Avg Price Per Unit
		AGO			AGO	
Private label	\$62.8	1.5%	26.9%	38.4	-0.9%	\$1.63
No Yolks	40.4	-5.0	17.3	19.7	-12.8	2.05
Light 'N Fluffy	15.9	1.9	6.8	8.4	-6.7	1.90
Pennsylvania Dutch	13.0	-3.7	5.6	7.4	-0.4	1.77
Creamette	7.3	7.1	3.1	3.5	4.4	2.09
Mueller's	7.3	-25.4	3.1	3.8	-26.6	1.89
Das Dutchman Essenhaus	6.8	-5.4	2.9	2.2	-7.2	3.06
Inn Maid	5.8	-10.0	2.5	3.4	-14.1	1.73
Manischewitz	5.6	7.1	2.4	2.9	14.2	1.96
American Beauty	5.0	-3.3	2.1	2.3	-10.9	2.19
Category total	233.3	-0.7		120.7	-4.5	1.93

Source: SymphonyIRI Group
Spaghetti/Macaroni/Pasta (No Noodles)

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Pasta continues to be a family favorite as dollars reached nearly \$2 billion. Store brands, up 0.8%, accounted for 29.0% of market share while number two Barilla inched closer to the top, up 4.0%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price Per Unit
Private label	\$561.2	0.8%	29.0%	425.0	0.1%	\$1.32
Barilla America	541.7	0.9	28.0	384.7	1.6	1.41
New World Pasta	380.0	-3.9	19.7	283.1	-5.6	1.35
American Italian Pasta Co.	159.0	5.6	8.2	117.0	3.5	1.36
Molino E Pastificio De Cecco pescara	33.2	-6.4	1.7	14.0	-9.6	2.37

Total U.S. sales through supermarkets drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price Per Unit
Private label	\$561.2	0.8%	29.0%	425.0	0.1%	\$1.32
Barilla	471.7	4.0	24.4	348.8	4.6	1.35
Ronzoni	97.3	-1.0	5.0	80.0	-4.2	1.22
Mueller's	89.4	8.0	4.6	70.6	5.8	1.27
Creamette	67.8	2.8	3.5	47.2	2.1	1.44
Barilla Plus	57.9	-6.5	3.0	26.5	-8.7	2.18
San Giorgio	44.2	6.4	2.3	34.6	-8.8	1.28
American Beauty	38.9	-4.6	2.0	25.1	-2.9	1.55
Skinner	38.2	9.7	2.0	27.1	14.6	1.41
De Cecco	33.2	-6.4	1.7	14.0	-9.6	2.37
Category total	1,932.6	0.8		1,435.0	0.0	1.35

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Source: SymphonyIRI Group

Spaghetti/Italian Sauce

Though Campbell Soup's Prego was the top brand, Unilever garnered the top vendor spot, led by its Ragu and Bertolli brands. Other than Prego (up 5.0%), the only other brand to show significant gains was Francesco Rinaldi, up 4.0%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price Per Unit
Unilever Bestfoods Nth American	\$756.3	-3.4%	34.5%	352.8	-2.0%	\$2.14
Campbell Soup Co.	386.9	2.8	17.6	156.9	2.3	2.47
H J Heinz Co.	245.4	-4.2	11.2	96.3	-4.6	2.55
Private label	195.5	0.6	8.9	118.2	0.1	1.65
Conagra Foods	125.4	-12.3	5.7	119.8	-11.0	1.05

Total U.S. sales through supermarkets drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg Price Per Unit
Prego	\$352.6	5.0%	16.1%	142.2	4.8%	\$2.48
Ragu	260.7	-2.6	11.9	131.0	-0.6	1.99
Ragu Old World Style	245.6	-4.9	11.2	105.9	-3.7	2.32
Private label	195.5	0.6	8.9	118.2	0.1	1.65
Bertolli	154.6	0.0	7.0	65.0	0.8	2.38
Classico Signature Recipes	144.7	-5.4	6.6	58.8	-6.0	2.46
Hunts	124.6	-12.4	5.7	119.3	-11.0	1.04
Classico Traditional Favorites	96.6	-3.6	4.4	36.2	-3.9	2.67
Ragu Robusto	73.3	-7.3	3.3	41.4	-5.4	1.77

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Francesco Rinaldi	68.0	4.0	3.1	45.2	-1.2	1.51
Category total	2,194.2	-0.7		1,039.2	-1.63	2.11

Source: SymphonyIRI Group
 Refrigerated Breakfast Sausage/Ham
 The category did well last year, up 2.4% in dollars and 3.4% in units. Hillshire and its Jimmy Dean brand paced the category with almost 34% market share. Johnsonville also did well, up almost 10%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Hillshire Brands	\$485.8	2.7%	34.4%	143.0	1.1%	\$3.40
Johnsonville Sausage	141.8	9.9	10.0	44.2	11.7	3.21
Bob Evans Farms	126.5	-8.9	9.0	37.9	-1.2	3.33
Private label	123.6	5.2	8.8	45.1	5.6	2.74
Odom's Tennessee Pride Ssge	87.2	1.1	6.2	25.8	6.7	3.39

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Jimmy Dean	\$476.9	2.7%	33.8%	141.3%	1.1	\$3.38
Johnsonville	141.8	9.9	10.0	44.2	11.7	3.21
Bob Evans	123.8	-6.5	8.8	37.0	2.5	3.35
Private label	123.6	5.2	8.8	45.1	5.6	2.74
Tennessee Pride	87.0	2.3	6.2	25.7	7.9	3.38
Swaggerty	30.8	29.7	2.2	5.6	35.9	5.48
Owen's	27.8	8.2	2.0	8.0	18.6	3.47
Eckrich Smok-y	26.9	38.4	1.9	10.4	38.6	2.58
Jennie-O	20.6	-3.1	1.5	5.3	-5.4	3.92

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Turkey Store

Farmland	18.5	2.0	1.3	10.0	6.1	1.85
Category	1,411.7	2.4		440.7		
	3.4	2.20				

total

Source: SymphonyIRI Group

Frozen Breakfast (handheld)

The category was up nearly 10%, led primarily by Hillshire Brands Jimmy Dean products. Overall, Hillshire accounted for more than 55% of dollars, up 7.9%. Store brands also did well, increasing by more than 13% in dollars and a whopping 48.1% in units.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG PRICE PER UNIT
Hillshire Brands	\$487.2	7.9%	55.9%	73.8	0.9%	\$6.60
Odom's Tennessee Pride Sausage	91.7	2.8	10.5	17.8	3.3	5.13
Private label	57.3	13.3	6.5	14.7	48.1	3.89
Heinz Frozen Foods	48.2	20.0	5.5	16.6	18.2	2.89
Nestle USA	46.2	5.0	5.3	21.6	12.0	2.14

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27,

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Jimmy Dean	\$386.1	7.0%	44.3%	58.3	0.1%	\$6.61
Odom's Tennessee Pride	64.5	14.3	7.4	12.0	16.9	5.37
Jimmy Dean Delights	64.2	2.055, 204.9	7.3	9.6	1.606, 964.1	6.67
Private label	57.3	13.3	6.5	14.7	48.1	3.89
Wght Wtchrs	35.1	-11.6	4.0	11.7`	-15.6	2.99

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Smrt Ones
Mrnn Exp

Hot Pockets	29.9	5.6	3.4	12.9	11.8	2.31
Jimmy Dean Dlights	27.7	-61.9	3.1	4.0	-62.9	6.79
Tennessee Pride	27.2	-16.8	3.1	5.8	-16.5	4.64
Kellogg's Special K	21.6	N/A	2.4	3.9	N/A	5.52
Pillsbury	16.7	6.5	1.9	6.4	4.5	2.57
Category total	70.9	9.8		185.6	8.2	4.69

Source: SymphonyIRI Group
Spice/Seasoning--No Salt/Pepper

The competition is closing in on category leader McCormick. Store brands were up 13.2% and ACM was up 8.9% versus only 1.9% for McCormick. Overall dollars were up 6% and units 2.8%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
McCormick & Co.	\$711.2	1.9%	37.1%	240.7	-2.2%	\$2.95
Private label	285.1	13.2	14.9	135.6	6.2	2.10
ACH Food Companies	160.0	8.9	8.4	43.7	4.7	3.66
B & G Foods	90.5	-2.9	4.7	29.3	-1.8	3.08
Goya Foods	71.8	6.8	3.7	34.8	5.8	2.06

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
McCormick's	\$398.4	3.3%	20.8%	113.5	0.0%	\$3.51
Private label	285.1	13.2	14.9	135.6	6.2	2.10
McCormick Gourmet	122.4	-0.4	6.4	23.0	-6.6	5.32

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Collection

McCormick Grill Mates	93.2	6.0	4.9	35.3	1.0	2.64
Tones	67.9	11.5	3.5	18.3	3.0	3.71
Mrs. Dash	62.1	-2.5	3.2	21.1	-1.0	2.94
Spice Islands	55.5	6.9	2.9	10.7	9.4	5.16
Badia	53.8	13.4	2.8	25.2	10.3	2.13
Spice World	52.1	-0.2	2.7	18.5	0.4	2.81
Sazon Goya	44.7	6.0	2.3	21.8	5.5	2.05
Category total	1,916.4	6.0		724.5	2.8	2.65

Source: SymphonyIRI Group

Condensed Wet Soup

Campbell's stands unchallenged. With eight of the top 10 brands, the soup giant controls more than 80% of the category. The only other significant player is private label, with almost 18% market share, down 1.2% versus last year.

[ILLUSTRATION OMITTED]

TOP VENDORS.	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Campbell Soup Co.	\$1,324.9	0.6%	81.4%	1,010.0	-6.4%	\$1.31
Private label	291.4	-1.2	17.9	307.0	-5.1	0.95
Snow's/ Doxsee	2.2	-10.5	0.41	1.3	-9.7	1.63
Pacific Foods of Oregon	2.0	41.5	0.1	0.8	30.2	2.66
Locks Gourmet Food Co.	1.8	26.4	0.1	0.5	32.8	3.76

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG PRICE PER UNIT
Campbell's	\$1,089.3	-0.5%	66.9%	847.9	-7.6%	\$1.28
Private	291.4	-1.2	17.9	307.0	-5.1	0.95

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

label

Campbell's Healthy Request	191.1	8.5	11.7	131.3	3.1	1.46
Campbell's Light	13.2	-14.4	0.8	9.1	-17.8	1.45
Campbell's Disney Princess	7.2	13.2	0.4	5.0	9.5	1.45
Campbell's Disney Phineas & Ferb	5.9	N/A	0.4	4.1	N/A	1.45
Campbell's Scooby Doo	5.2	N/A	0.3	3.5	N/A	1.46
Campbell's Batman	4.2	1.5	0.3	2.9	-0.3	1.45
Campbell's Danny Phantom	3.7	-21.8	0.2	2.6	-24.3	1.41
Snow's	2.2	-10.5	0.1	1.3	-9.7	1.63
Category total	1,627.3	0.3		1,322.7	-6.0	1.23

Source: SymphonyIRI Group

Dry Soup

The Lipton brand took two of the top three spots. Overall, the category was flat, with dollars around \$361 million and units around 217million. Average price per unit was \$1.66, nearly 20 cents less than last year.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG PRICE PER UNIT
Unilever Bestfoods Nth America	\$161.1	-1.4%	44.6%	110.0	0.3%	\$1.47
Bear Creek Country Kitchens	59.6	-1.2	16.5	17.3	2.5	3.45
Private label	29.4	-0.5	8.1	25.3	-3.4	1.16
Nongshim	19.7	7.6	5.5	14.9	7.3	1.32
H.J. Heinz Co.	14.6	-5.9	1.0	7.3	-3.9	2.00

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIOS)	CHANGE VS. YEAR AGO	Avg PRICE PER UNIT
Lipton Recipe Secrets	\$83.3	-1.6%	23.1%	52.8%	-0.6%	\$1.58
Bear Creek Country Kitchens	59.6	-1.2	16.5	17.3	2.5	3.45
Lipton Soup Secrets	40.6	1.2	11.2	27.6	1.8	1.47
Private label	29.4	-0.5	8.1	25.3	-3.4	1.16
Knorr	25.9	-0.5	7.2	21.8	4.9	1.19
Nongshim	19.6	7.2	5.4	14.9	7.2	1.32
Wylers Mrs. Grass	14.6	-5.9	4.0	7.3	-3.9	2.00
Hurst's HamBeens	14.3	-0.6	4.0	5.4	-3.6	2.64
Lipton Cup-a-Soup	11.2	-10.6	3.1	7.8	-10.4	1.45
Shore Lunch	5.3	4.3	1.5	1.5	7.8	3.63
Category total	361.1	-0.1		217.7	0.9	1.66

Source: SymphonyIRI Group
 Ready-to-Serve Wet Soup
 General Mills' Progresso captured top brand honors. However, Campbell's and its extensive product line led the way on the manufacturersside. Overall, category dollars were up nearly 3.0%, with sales of nearly \$1.9 billion. Units were up 1.6%.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	Avg PRICE PER UNIT
Campbell Soup Co.	\$835.9	-0.7%	44.5%	449.3	-1.2%	\$1.86
General Mills	749.0	7.8	39.9	427.7	6.8	1.75
Private label	76.2	-9.1	4.1	43.1	-13.9	1.77

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Conagra Foods	75.6	-2.4	4.0	36.3	-6.9	2.09
Amy's Kitchen	40.0	20.1	2.1	14.6	16.8	2.74

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Progresso	\$722.5	9.5%	38.5%	412.8	8.4%	\$1.75
Campbell's Chunky	402.0	0.2	21.4	218.6	1.4	1.84
Campbell's Chunky Hlthy Reqst	144.3	5.3	7.7	80.4	5.7	1.79
Campbell's 100% Natural	96.2	N/A	5.1	52.5	N/A	1.83
Private label	76.2	-9.1	4.1	43.1	-13.9	1.77
Healthy Choice	66.0	-10.8	3.5	33.7	-11.8	1.96
Campbell's	50.4	7.9	2.7	27.1	3.4	1.86
Amy's	39.6	19.0	2.1	14.6	16.5	2.72
Campbell's Go	36.3	N/A	1.9	22.7	N/A	1.60
Campbell's Slow Kettle	27.7	60.2	1.5	8.3	63.6	3.35
Category total	1,878.6	2.9		1,008.9	1.6	1.86

Source: SymphonyIRI Group

Dog Biscuits/Treats/Beverages

A strong year by Milk-Bone (up 9.2%) catapulted the brand over private label (-2.9%) and into the top spot. The category as a whole did well with dollars just below \$2 billion, up 5%, and up almost 3% in units.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG PRICE PER UNIT
Del	\$757.2	11.5%	37.9%	219.1	9.3%	\$3.46

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Monte Foods						
Nestle Purina Petcare Co.	263.4	8.2	18.2	78.8	4.3	4.61
Waggin' Train	274.3	-8.6	13.7	41.0	-5.8	6.70
Private label	211.3	-2.9	10.6	72.8	-5.8	2.90
Mars	194.7	12.8	9.7	46.4	1.4	4.20

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG PRICE PER UNIT
Milk-Bone	\$216.6	8.2%	10.8%	55.0	7.1%	\$3.93
Private label	211.3	-2.9	10.6	72.8	-5.8	2.90
Waggin' Train Jerky Tenders	184.9	-11.3	9.3	21.2	-3.6	8.71
Purina Beggin' Strips	169.2	0.6	8.5	29.5	-7.6	5.74
Pup Peroni	146.8	-4.3	7.4	26.6	-10.2	5.53
Milo's Kitchen	109.8	69.5	5.5	18.2	48.5	6.03
Pedigree Dentastix	108.7	36.0	5.4	22.4	19.5	4.85
Canine Carry Outs	90.5	38.7	4.5	62.7	44.9	1.44
Purina Busy Bone	57.4	8.7	2.9	13.1	-1.5	4.39
Milk-Bone Flavor Snacks	52.4	-9.6	2.6	11.2	-12.6	4.69
Category total	1,997.4	5.0		510.4	2.9	3.91

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Source: Symphony IRI Group

Dry Dog Food

Private label dollar share (18%) was more than double any national brand. However, Nestle Purina was far and away the top vendor with 45% market share. Overall category dollars topped \$5 billion, up almost 3%. Units were off slightly.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES	CHANGE	SHARE	UNIT SALES	CHANGE	AVG.
	(MILLIONS)	VS YEAR		(MILLIONS)	VS.	PRICE
		AGO			YEAR	PER UNIT
Nestle Purina Petoare Co.	\$2,337.3	5.0%	45.0%	178.9	1.7%	\$13.06
Private label	932.6	-0.4	18.0	81.9	-7.5	11.38
Mars	617.7	3.2	11.9	48.8	3.5	12.65
Procter & Gamble	556.8	-1.2	10.7	32.2	-0.9	17.32
Del Monte Foods	489.9	-1.4	9.4	52.9	-1.7	9.26

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES	CHANGES	SHARE	UNIT SALES	CHANGE	AVG.
	(MILLIONS)	VS YEAR		(MILLIONS)	VS YEAR	PRICE
		AGO			AGO	PER UNIT
Private label	\$932.6	-0.4%	18.0%	81.9	-7.5%	\$11.38
Pedigree	423.6	6.3	8.2	29.6	5.8	14.31
Purina One Smartblend	283.6	55.9	5.5	15.5	42.6	18.26
Purina Dog Chw Hlthy Lif Nutritn	264.2	-38.9	5.1	19.4	-36.7	13.61
Kibble 'n Bits	262.6	-2.5	5.1	27.4	-2.4	9.57
Purina Beneful	259.0	-1.4	5.0	19.9	-4.7	12.99
Purina Dog Chow	253.7	200.2	4.9	14.0	234.5	18.09

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Purina Beneful Healthy Weight	221.4	-2.6	4.3	16.0	-4.1	13.85
Imas Proactive Health	156.0	5.2	3.0	8.0	11.9	19.49
Purina Alpo Prime Cuts	110.6	13.7	2.1	11.7	5.8	9.47
Category total	5,189.9	2.9		420.5	-0.6	12.34

Source: SymphonyIRI Group

Wet Dog Food

Category dollars were the same as last year while units were down slightly (-1.5%). Cesar Canine Cuisine (13.9%) and Pedigree (12.2%) were the top brands, followed closely by private label (11.1%). Mars was the top vendor at 47.6%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Mars	\$640.8	2.2%	47.6%	533.5	-0.1%	\$1.20
Nestle Purina Petcare Co.	446.9	-3.2	33.2	341.3	-2.7	1.31
Private label	150.1	-12.2	11.1	144.4	-18.8	1.04
Del Monte Foods	48.6	29.9	3.6	67.3	49.4	0.72
Procter & Gamble	27.6	-7.3	2.1	14.8	-12.0	1.87

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Cesar Canine Cuisine	\$187.1	-2.9%	13.9%	176.8	-10.7%	\$1.06
Pedigree	164.3	6.4	12.2	145.2	5.7	1.13
Private label	150.1	-12.2	11.1	144.4	-18.8	1.04

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Pedigree Choice Cuts	127.1	2.5	9.4	89.0	0.9	1.43
Purina Alpo Prime Cuts	93.5	0.2	6.9	68.8	-0.6	1.36
Purina Beneful Prepared Meals	83.8	-7.9	6.2	45.3	-9.9	1.85
Pedigree Little Champions	77.7	-4.0	5.8	30.1	-11.9	2.58
Purina Alpo Prime Slices	40.9	-9.4	3.0	32.3	-4.7	1.26
Purina Alpo Chop House Originals	31.5	-4.7	2.3	27.5	1.2	1.15
Purina Alpo Chop House	28.8	7.0	2.1	31.9	3.3	0.90
Category total	1,346.8	0.0		1,121.8	-1.5	1.20

Source: SymphonyIRI Group

Cat Snacks/Beverages

Cats love their snacks. The category was up 5.2% in dollars and almost 2% in units. Top vendors Mars (57.5%) and Nestle (34.8%) grabbed the lion's share of dollars and were up 6.7% and 7.2% respectively. Average price per unit was \$1.82.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG PRICE PER UNIT
Mars	\$216.5	6.7%	57.5%	111.8	3.2%	\$1.94
Nestle	131.0	7.2	34.8	76.4	3.3	1.71
Purina Petcare Co.						
Del Monte Foods	14.3	-15.6	3.8	10.7	-8.5	1.33
Worldwise	5.2	-1.9	1.4	1.5	-10.5	3.42
Del Monte Pet Foods	3.0	-15.9	0.8	3.0	-14.4	1.00

Total U.S. sales through supermarkets, drugstores,

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Whiskas Temptations	\$149.9	1.7%	39.8%	74.0	-4.2%	\$2.03
Friskies Party Mix	75.6	14.5	20.1	41.3	8.8	1.83
Whiskas Temptations Mixups	28.6	86.2	7.6	16.1	72.6	1.77
Purina Whisker Lckn's Crnch Lvrs	16.4	-4.2	4.4	10.7	-4.4	1.54
Purina Whiskr Lckn's Tnder Mmnts	13.8	-5.7	3.7	11.3	-7.2	1.22
Whiskas Temptations Natural	8.6	-19.9	2.3	5.1	-11.9	1.70
The Goodlife Recipe	7.4	-28.1	2.0	2.8	-31.0	2.60
Pounce	7.2	-6.3	1.9	6.7	4.3	1.08
Purina Whisker Lickin's	6.9	16.5	1.8	2.4	16.6	2.83
Friskies Crispies	6.9	48.6	1.8	4.6	49.8	1.50
Category total	376.2	5.2		207.3	1.8	1.82

Source: SymphonyIRI Group
 Dry Cat Food
 Nestle Purina was the runaway leader with 50.6% of dollar share, up 3.8%. Private label captured top spot on the brand side with 9.8% dollar share. Overall category dollars topped \$2.2 billion, while units were down 3.4%.

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Nestle Purina Petcare	\$1,135.7	3.8%	50.6%	163.3%	-2.6%	\$6.95

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Co.

Del 409.6 6.4 18.2 58.0 6.8 7.07

Monte
Pet
Foods

Private 219.8 -14.2 9.8 38.4 -14.2 5.72
label

Procter 213.1 -0.3 9.5 20.0 1.2 10.63
&
Gamble

Del 147.4 -1.3 6.6 23.2 -3.1 6.34
Monte
Foods

Total L.I.S. sales through supermarkets, drugstores,
mass merchandise outlets and select club and dollar
chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE PER UNIT
Private label	\$219.8	-14.2%	9.8%	38.4	-14.2%	\$5.72
Meow Mix	189.0	-22.5	8.4	22.5	-35.2	8.41
Purina Kit & Kaboodle	146.3	42.1	6.5	17.6	29.3	8.23
Purina Cat Chow Cmplte Formula	129.0	-28.0	5.7	13.9	-36.5	9.26
Meow Mix Original Choice	123.4	34.7	5.5	18.5	115.9	7.48
Purina Cat Chow Indoor Formula	104.2	-29.7	4.6	12.4	-40.7	8.43
Friskies Seafood Sensations	94.8	4.7	4.2	13.0	-2.4	7.31
Iams Proactive Health	92.0	7.6	4.1	8.0	9.9	11.44
9 Lives Daily Essentials	80.7	-5.1	3.6	10.6	-5.0	7.68
Friskies Feline	70.6	22.9	3.1	10.2	8.9	6.95

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Favorites

Category	2,245.7	0.4	325.7	-3.4	6.89
total					

Source: SymphonyIRI Group

Wet Cat Food

Purina Fancy Feast (25.2%) and Friskies (23.2%) went neck and neck for the top brand spot. No other brand reached double-digits. Private label held the third spot with 6.6% market share. Overall, the category was up 4.6%.

{ILLUSTRATION OMITTED}

TOP VENDORS	\$SALES (MILLIONS)	CHANGE VS. YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR	AVG. PRICE
		YEAR AGO			YEAR AGO	PER UNIT
Nestle Purina Petcare Co.	\$1,423.0	6.2%	73.4%	1,629.3	0.0%	\$0.87
Del Monte Foods	151.5	-2.7	7.9	132.5	-1.6	1.14
Private label	126.6	-5.5	6.6	186.0	-8.0	0.68
Del Monte Pet Foods	97.2	20.6	5.1	75.6	18.1	1.28
Mars	91.5	6.3	4.8	63.7	-6.3	1.44

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLIONS)	CHANGE VS. YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS. YEAR AGO	AVG. PRICE
						PER UNIT
Purina Fancy Feast	\$483.4	0.1%	25.2%	560.2	-4.4%	\$0.86
Friskies	444.9	0.5	23.2	519.1	-4.9	0.86
Private label	126.6	-5.5	6.6	186.0	-8.0	0.68
9 Lives	111.6	5.5	5.8	90.4	0.1	1.23
Friskies Prime Filets	99.5	4.4	5.2	123.1	-9.6	0.81
Purina Fancy Feast	95.3	-1.3	5.0	69.9	-6.8	1.36

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Elgant
Mdlys

Meow Mix	80.9	0.8	4.2	59.7	-6.3	1.35
Market Select						
Friskies	67.7	63.4	3.5	100.9	32.3	0.67
Tasty Treasures						
Fancy Feast Gravy Lovers	53.7	41.0	2.8	64.5	11.9	0.83
Fancy Feast Appetizers	43.9	-1.7	2.3	34.6	-4.4	1.27
Category total	1,914.9	4.6		2,119.0	-0.4	0.90

Source: SymphonyIRI Group
Breakfast/Cereal/Snack Bars

With five of the top six brands, Kellogg's is the first name in the category, capturing almost 60% market share. Private label was a distant second at 8.1%, down 8.5% in dollars. General Mills took 5.7% market share. Overall the category was down in dollars (-5.5%) and units (-4.4%).

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGEVS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGEYS YEAR AGO	AVG. PRICE PER UNIT
Kellogg Co.	\$668.8	\$3.1%	59.8%	214.7	-2.3%	\$3.11
Private label	91.2	-8.5	8.1	43.9	-8.3	2.08
General Mills	64.4	-10.9	5.7	24.6	-10.2	2.61
Small Planet Foods	47.5	22.2	4.2	29.0	26.6	1.64
Atkins Nutritionals	33.6	21.4	3.0	5.3	20.2	6.29

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Kellogg's	\$203.0	-3.5%	18.1%	65.3	-2.4%	\$3.11
Kellogg's Rice Krispies	167.6	-1.3	15.0	51.8	0.5	3.23

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Kellogg's Special K	162.6	-22.0	14.5	52.2	-21.7	3.11
Private label	91.2	-8.5	8.1	43.9	-8.3	2.08
Kellogg's Special K Fruit Crisps	77.1	-9.2	6.9	23.6	-14.8	3.26
Kellogg's Special K Pastry Crisps	50.4	N/A	4.5	18.1	N/A	2.78
Larabar	43.3	11.9	3.8	26.8	17.3	1.62
Atkins Day Break	33.6	21.4	3.0	5.3	20.2	6.29
Kashi TLC	23.2	-30.8	2.0	7.3	-30.3	3.15
General Mills Lucky Charms Treats	16.6	7.2	1.4	6.2	0.1	2.66
Category total	1,117.3	-5.5		402.6	-4.4	2.77

Source: SymphonyIRI Group
Margarine/Spreads/ Butter Blends

The category struggled through an off year as dollars were down 4.5% and units were down 6.4%. Unilever brands accounted for more than half of category sales. Overall, sales reached \$1.9 billion.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR	AVG. PRICE
	AGO			AGO	PER UNIT	
Unilever Bestfoods Nrth America	\$977.5	-3.5%	51.2%	372.8	-3.2%	\$2.62
ConAgra Foods	322.6	-3.5	16.9	219.6	-7.6	1.47
Smart Balance	220.8	-14.9	11.6	65.1	-20.3	3.39
Land O'Lakes	204.8	3.3	10.7	79.6	-1.2	2.57
Private label	103.7	-8.1	5.4	64.7	-11.7	1.60

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Shedd's Country Crock	\$315.6	-0.2%	16.5%	108.8	-0.5%	\$2.90
I Can't Believe It's Not Butter	287.7	-6.4	15.1	87.3	-7.4	3.30
Blue Bonnet	198.1	-0.4	10.4	150.6	-5.0	1.32
Smart Balance	184.3	-11.3	9.7	53.6	-15.7	3.44
Land O'Lakes	176.9	5.5	9.3	67.8	0.4	2.61
Private label	103.7	-8.1	5.4	64.7	-11.7	1.60
Shedd's Country Crock Plus	89.9	0.8	4.7	26.8	2.4	3.35
Imperial	84.7	7.8	4.4	80.8	4.8	1.05
I Can't Believe It's Not Butter Light	78.6	-5.3	4.1	25.9	-5.1	3.04
Parkay	73.3	-8.1	3.8	36.5	-13.3	2.01
Category total	1,908.2	-4.5		840.2	-6.4	2.27

Source: SymphonyIRI Group

Refrigerated Butter Apparent price decreases led to greater units (5.1%) but decreased dollars (-3.8%). Private label accounted for more than 55% of dollars, though down 8%. Land O'Lakes was the top national brand, with 25% market share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$1,055.9	-8.0%	55.1%	377.7	2.3%	\$2.80
Land O'Lakes	479.8	0.2	25.0	139.1	7.0	3.45

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Challenge Dairy Products	74.4	-2.6	3.9	23.3	5.9	3.19
Kellers Creamery	73.4	1.8	3.8	27.2	3.9	2.69
Tillamook County Creamery	29.3	-2.1	1.5	9.1	5.8	3.22

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Private label	\$1,055.9	-8.0%	55.1%	377.7	2.3%	\$2.80
Land O'Lakes	476.6	-0.4	24.9	138.0	6.3	3.45
Challenge Butter	68.5	-2.7	3.6	21.8	5.6	3.15
Breakstone's	33.4	-4.7	1.7	13.1	-4.8	2.56
Tillamook	29.3	-2.1	1.5	9.1	I 0.8	3.22
Crystal Farms	21.8	-11.1	1.1	7.3	-4.5	2.99
Cabot	20.5	-2.7	1.1	6.4	3.9	3.19
Keller's	19.8	3.5	1.0	6.7	9.6	2.93
Hotel Bar	19.3	11.6	1.0	7.1	16.4	2.70
Smart Balance	16.8	N/A	0.9	7.8	N/A	2.15
Category total	1,917.4	-3.8		641.7	5.1	2.99

Source: SymphonyIRI Group

Cookies

Cookie sales are certainly not crumbling. The category continues to inch closer to \$7 billion in sales, up almost 5% versus last year. Consumer favorites are spread out as no national brand was able to capture double-digit market share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AVG. PRICE PER UNIT
Kraft Foods	\$2,515.8	5.4%	-37.0%	877.4	1.5%	\$2.87

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Private label	1,041.2	0.5	15.3	462.6	-5.3	2.25
Keebler Co.	558.8	-4.1	8.2	209.3	-2.0	2.67
McKee Foods Corp.	458.3	3.5	6.7	236.9	-2.3	1.93
Pepperidge Farm	340.3	-2.8	5.0	113.5	0.1	3.00

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	Avg. Price per unit
Private label	\$1,041.2	0.5%	15.3%	462.6	-5.3%	\$2.25
Nabisco Oreo	528.2	3.9	7.7	167.4	3.1	3.16
Nabisco Chips Ahoy	519.8	0.3	7.6	198.8	-4.6	2.61
Nabisco Oreo Double Stuf	237.3	7.4	3.5	77.4	4.6	3.06
Little Debbie	210.3	3.1	3.1	111.8	-2.8	1.88
Lot t ho use	185.8	12.1	2.7	51.6	3.8	3.59
Little Debbie Nutty Bar	148.0	4.0	2.1	73.9	-2.7	2.00
Nabisco Nilla	131.8	6.4	1.9	38.6	3.3	3.41
Nabisco Newtons	130.1	10.7	1.9	38.0	0.7	3.42
Pepperidge Farm Milano	98.0	-7.9	1.4	34.6	-6.9	2.83
Category total	6,787.7	4.9		2,720.5	1.8	2.50

Source: SymphonyIRI Group
Crackers

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

On the vendor side Kraft was king, (33.3% market share), but Pepperidge Farm was the biggest gainer, up almost 10%. On the brand side Cheez It captured the top spot on the strength of \$590 million in sales. The category was up 5.1%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	Avg. PRICE PER UNIT
Kraft foods	\$1,567.8	2.7%	33.3%	576.9	2.5%	\$2.72
Kellogg Co.	831.5	6.5	17.7	281.3	4.8	2.95
Pepperidge Farm	726.3	9.9	15.4	282.8	9.3	2.57
Keebler Co.	477.3	-4.6	10.1	164.3	-4.1	2.90
Private label	223.8	1.6	4.7	122.6	0.7	1.82

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS YEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	Avg. PRICE PER UNIT
Sunshine Cheez It	\$590.7	7.8%	12.5%	200.0	5.8%	\$2.95
Nabisco Ritz	542.9	15.2	11.5	202.4	17.5	2.68
Pepperidge Farm Goldfish	423.4	14.2	9.0	161.5	13.4	2.62
Nabisco Wheat Thins	364.1	5.5	7.7	130.7	5.9	2.79
Nabisco Triscuit	326.5	9.2	6.9	120.1	11.0	2.72
Private label	223.8	1.6	4.7	122.6	0.7	1.82
Keebler Club	204.6	-1.0	4.3	72.9	-0.2	2.81
Stacy's Pita Chips	179.4	19.2	3.8	52.0	15.7	3.44
Snack Factory	144.6	63.5	3.0	48.0	65.1	3.01

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Pretzel

Crisps

Kellogg's Special K	136.4	25.9	2.9	46.3	27.3	2.94
Category total	4,697.8	5.1		1,723.3	4.4	2.73

Source: SymphonyIRI Group

Snack Nuts

Snack nuts were a hit last year. Dollars were up an impressive 11.2%, generating more than \$3.5 million. Store brands led with almost 30% of market share while the Planters brand was not far behind at 23.6%. Average price per unit increased to \$4.22.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$ SALES (MILLIONS)	CHANGE VS YEAR	SHARE AGO	UNIT SALES (MILLIONS)	CHANGE VS YEAR	AVG. PRICE PER UNIT
Private label	\$1,061.2	10.4%	29.6%	249.0	4.4%	\$4.26
Kraft Foods	967.7	1.4	27.0	176.0	-15.9	5.50
Paramount Farms	558.9	37.1	15.6	103.3	45.7	5.41
Blue Diamond Growers	308.8	25.6	8.6	75.2	17.5	4.10
Diamond Foods	176.8	-5.2	4.9	46.8	-12.1	3.78

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$ SALES (MILLIONS)	CHANGE VS YEAR	SHARE AGO	UNIT SALES (MILLIONS)	CHANGE VS YEAR	AVG. PRICE PER UNIT
Private label	\$1,061.2	10.4%	29.6%	249.0	4.4%	\$4.26
Planters	845.4	0.8	23.6	154.6	-17.5	5.47
Wonderful	527.9	38.5	14.7	95.9	47.8	5.50
Blue Diamond	308.8	25.6	8.6	75.2	17.5	4.10
Emerald	171.4	-2.8	4.7	48.0	-11.0	3.72
Planters Nutrition	83.7	51.3	2.3	14.9	38.6	5.59

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Hampton Farms	53.5	18.0	1.5	18.7	7.6	2.86
Everybody's Nuts	26.0	21.1	0.7	5.6	14.4	4.64
Hines	25.9	83.7	0.7	9.0	66.5	2.80
Imperial Nuts	24.1	6.4	0.6	8.7	-1.2	2.76
Category total	3,580.3	11.2		848.0	2.6	4.22

Source: SymphonyIRI Group

Cooking & Salad Oils

Wesson, Crisco and Mazola may be the big names, but store brands are bringing home the money. Private label accounted for 44.4% of dollars up 1.4%. Overall, the category was up 2.4%, generating almost \$1.9 billion in sales.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$840.3	1.4%	44.4%	201.8	-0.7%	\$4.16
ConAgra	322.5	1.2	17.0	64.1	-0.8	5.03
J. M. Smucker Co.	234.8	-5.8	12.4	53.5	-8.1	4.39
ACH Food Companies	191.7	1.0	10.1	34.0	3.7	5.83
Ventura Foods	94.5	6.4	5.0	14.4	7.6	8.55

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$840.3	1.4%	44.4%	201.8	-0.7%	\$4.16
Wesson	322.5	1.2	17.0	64.1	-0.8	5.03
Crisco	233.5	-5.5	12.3	53.1	-8.1	4.39
Mazola	168.2	1.7	8.8	28.1	5.4	5.97
LouAna	94.4	6.4	4.9	14.4	7.8	6.55
1 2 3	28.8	15.0	1.5	12.6	4.3	2.29

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories; The State of the I....

Spectrum Naturals	28.8	91.6	1.5	3.5	67.5	6.00
CWP	24.7	32.6	1.3	12.0	28.4	2.05
Smart Balance Omega	16.6	-15.1	0.9	4.5	-18.4	4.10
Mazola Vegetable Plus	11.7	-2.9	0.6	2.8	-2.9	4.15
Category total	1,892.3	2.4		419.7	0.4	4.51

Source: SymphonyIRI Group

Microwave Browning/Pan Spray

Not surprisingly, ConAgra's PAM controlled more than half of category sales and was up 4.3% in dollars. Private label is the only significant competition, with market share approaching 37%, up 5.8%.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLION)	CHANGE VS TEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR	AGO PRICE
	AGO			AGO	PER UNIT	
ConAgra Foods	\$169.3	4.8%	51.3%	62.0	-1.0%	\$3.26
Private label	121.1	5.8	38.7	52.9	-1.5	2.29
J.M. Smucker Co.	18.8	18.0	4.7	6.8	11.7	2.28
B&G Foods	9.6	-0.4	2.9	4.3	0.2	2.22
Smart Balance	7.0	34.4	2.1	2.5	32.7	2.60

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR	AGO PRICE
	AGO			AGO	PER UNIT	
PAM	\$168.1	4.3%	51.0%	91.2	-2.1%	\$3.28
Private label	121.1	5.8	38.7	52.9	-1.5	2.29
Crisco	14.2	16.7	4.3	6.3	11.1	2.27
Baker's Joy	8.8	-2.8	2.7	4.0	-2.5	2.19
Smart	6.6	29.4	2.1	2.4	27.7	2.80

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Balance Omega						
Mazola	1.9	35.4	0.6	0.8	33.8	2.30
Winona Pure	1.5	92.8	0.5	0.4	109.0	3.48
Pillsbury	1.4	19.1	0.4	0.6	16.9	5.42
Naturally	1.2	1,177.6	0.4	0.7	948.1	1.69
Spectrum Naturals	1.1	24.8	0.3	0.2	21.2	6.60
Category total	329.8	6.3		120.8	0.3	2.73

Source: SymphonyIRI Group

Olive Oil

Olive oil dollars dipped a bit (-1.7%) while unit sales were identical to last year. Store brands were the best sellers at \$271.8 million, though down 6.0%. Sales for the top three national brands (Bertolli, Filippo Berio and Pompeian) were essentially flat.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$271.8	-6.0%	27.5%	43.4	-0.7%	\$6.25
Med Foods	211.6	-0.7	21.4	24.5	-0.9	8.64
Salov S.P.A.	144.2	1.4	14.5	19.0	7.1	7.68
Pompeian	81.8	0.1	8.2	13.4	-1.2	8.08
Colavita USA	34.0	-0.7	3.4	3.0	0.6	11.11

Total US. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$271.8	-6.0%	27.5%	43.4	-0.7%	\$6.25
Bertolli	167.6	0.9	18.9	19.4	0.8	6.61
Filippo Berio	143.8	1.3	14.5	18.9	7.0	7.57
Pompeian	81.4	0.0	8.2	13.4	-1.4	6.08

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Colavita	32.1	-4.7	3.2	2.8	-5.5	11.44
Star	29.7	-18.9	3.0	3.9	-17.8	7.52
Botticelli	21.0	0.2	2.1	2.8	4.2	7.43
Carapelli	20.9	-3.3	2.1	2.5	-4.0	6.06
Capatriti	16.3	18.5	1.6	1.6	30.0	9.70
Crisco	15.9	-22.3	1.6	3.2	-18.1	4.92
Category total	988.4	-1.7		138.8	0.0	7.12

Source: SymphonyIRI Group

Canned/Bottled Corn

Dollars in the category were flat while units decreased by 3.1%. Del Monte and General Mills continue to chase private label for the top spot. All three lost ground, however. The biggest brand gainer was Libby's, up 59% in dollars.

[ILLUSTRATION OMITTED]

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$231.9	-2.6%	35.4%	335.5	-5.1%	\$0.69
Del Monte Foods	188.5	-0.6	28.8	158.8	-12.4	1.19
General Mills	109.3	-5.2	16.7	96.4	-3.8	1.13
Seneca Foods Corp.	40.8	47.4	6.2	47.3	49.9	0.86
Juanita's Foods	22.7	6.3	3.5	10.1	1.9	2.24

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$231.9	-2.6%	35.4%	335.5	-5.1%	\$0.69
Del Monte Fresh Cut	134.0	-5.8	20.4	133.8	-14.8	1.00
Green Giant	95.5	-4.1	14.6	87.8	-2.5	1.09
Libby's	37.4	59.0	5.7	43.5	68.7	0.86
Del Monte	30.0	23.0	4.6	6.2	18.1	4.86

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Juanita's	22.7	6.3	3.5	10.1	1.9	2.24
Del Monte Fresh Cut Specialties	17.5	10.8	2.7	12.0	4.6	1.45
Bush's Best	12.7	1.5	1.9	7.8	-1.0	1.62
Green Giant Mexicorn	10.8	12.3	1.6	7.2	-16.1	1.47
Del Monte Summer Crisp	6.5	-3.5	1.0	5.9	-0.1	1.11
Category total	655.2	1.0		702.5	-3.1	0.93

Source: SymphonyIRI Group

Canned/Bottled Green Beans

Del Monte's Fresh Cut brand was down 7.7% in dollars. The more expensive Del Monte brand (\$4.73 per unit) was up 34%. Private label led the way with 35.5% market share.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Del Monte Foods	\$235.6	-0.5%	3B.2%	185.9	-11.9%	\$1.27
Private label	219.2	-1.8	35.5	306.8	-3.9	0.71
General Mills	51.6	-6.6	8.4	52.6	-1.2	0.98
Seneca Foods Corp.	38.1	45.0	5.7	43.3	41.4	0.81
Aliens	30.7	-6.2	5.0	22.6	-10.0	1.36

Total U.S. sales through supermarkets drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$219.2	-1.8%	35.5%	306.8	-3.9%	\$0.71
Del Monte Fresh Cul	161.5	-7.7	26.2	151.0	-15.5	1.06
Del Monte	47.0	34.0	7.8	9.9	26.3	4.73
Green Giant	41.8	-7.2	6.B	40.8	-1.3	1.02

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Libby's	31.4	58.9	5.1	39.3	55.0	0.80
The Aliens	25.2	-6.3	4.1	15.5	-6.8	1.62
Del Monte Fresh Cul Specialties	23.2	-4.0	3.8	15.8	-9.6	1.46
Hanover	18.0	-1.0	2.9	8.4	-1.8	2.14
Green Giant Kitchen Sliced	9.8	-3.9	1.6	11.7	-1.2	0.54
Glory Foods	8.9	18.5	1.4	4.1	16.0	2.16
Category total	617.5	0.6		641.7	-3.8	0.96

Source: SymphonyIRI Group

Canned Mixed Vegetables

Consumers are eating their canned vegetables to the tune of \$123 million in sales. Private label led the way with \$33.2 million in sales good for 27.1% market share. Del Monte and Aliens round out the top of the vendor list at 23.3% and 21.8% respectively.

[ILLUSTRATION OMITTED]

TOP VENDORS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$33.2	-3.3%	27.1%	46.3	-4.3%	\$0.72
Del Monte Foods	28.6	1.0	23.3	24.2	-5.4	1.18
Aliens	26.7	-3.2	21.8	20.2	-4.7	1.32
McCall Farms	14.5	16.9	11.8	13.6	13.6	1.07
Seneca Foods Corp.	5.4	20.9	4.4	6.5	22.5	0.83

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS	\$SALES (MILLION)	CHANGE VS TEAR AGO	SHARE	UNIT SALES (MILLIONS)	CHANGE VS YEAR AGO	AGO PRICE PER UNIT
Private label	\$33.2	-3.3%	27.1%	46.3	-4.3%	\$0.72
Veg All	19.2	2.8	15.6	14.3	1.3	1.35
Del Monte	18.8	0.3	15.3	15.1	-6.7	1.24

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Margaret Holmes	14.0	16.9	11.4	13.0	13.6	1.0B
Libby's	5.3	29.9	4.4	6.4	35.4	0.83
Del Monte Specialties	4.3	7.1	3.5	4.7	0.7	0.90
Del Monte Fresh Cut Specialties	3.5	12.0	2.9	2.5	6.6	1.41
Le Sueur	3.4	-7.5	2.8	2.1	-17.4	1.64
Veg All Home style	3.4	-4.8	2.7	1.7	-5.4	1.93
The Aliens	3.3	-28.0	2.7	3.2	-26.3	1.05
Category total	122.7	0.9		120.2	-1.7	1.02

Source: SymphonyIRI Group

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A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the Industry ALMANAC 2013)(Industry overview)

Grocery Headquarters

April 1, 2013

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Body

WRITTEN AND DEVELOPED BY THE GROCERY HEADQUARTERS EDITORIAL STAFF

THE SUPERMARKET INDUSTRY IS IN A BATTLE FOR ITS COLLECTIVE LIFE. A lackluster economy and uglier costs are impacting industry sales and profits. Competition is increasing from virtually every angle.

The result has been a downturn in sales in some major categories at the food store. As our annual State of the Industry report, developed with the SymplionyIRI Croup and sponsored in part by Kraft Foods, shows, many key segments posted drops in dollar and unit sales at supermarkets during the 12-month period ended Jan. 27.

High profile categories such as carbonated beverages, milk, bread and rolls and cereal showed drops in volume during the tracked period as consumers either moved on to replacement products or found other locations to purchase these items. "We don't just compete with other supermarket chains and Walmart and Target these days," says a senior executive with a West Coast chain. "Now, we have to worry about drug store chains, convenience store chains, dollar store chains, independent specialty operations and, more recently, Amazon.com and other e-commerce outlets. It is natural that they would take some business from us just by offering a sampling of products."

The \$113 billion carbonated beverage segment is a great example of losing sales to other retailers and a change in consumer shopping behavior. Down by about 2.1% in dollars and 2.7% in units during the tracked period, the carbonated beverage segment is quickly changing as more consumers seek healthier alternatives to these products. Of course, the big players in the field are moving into other products, especially bottled water, flavored teas and energy drinks. In fact, bottled water produced a solid 5.1% increase in dollar sales and 4% increase 110 in unit sales during the tracked period, testament to the change in consumer purchasing patterns. Wine, another growth area, showed a 4.2% increase in dollar sales and a 2.2% increase in unit sales. Yogurt, coffee-thanks to new delivery systems--and beer/ale/alcoholic cider also showed strong returns during the year.

Many industry observers say changing consumer behavior is responsible for this change in sales. With more shoppers looking for healthy alternatives, grocery retailers will have to respond accordingly, mostly by changing their merchandise mix to include new items that consumers want to at least experiment with, if not simply purchase on a regular basis.

Take the snack nuts/seeds/com nuts category for instance. This segment that once was the domain of convenience stores has now become a huge business in grocery stores. So huge that it accounted for more than \$1.7 billion in sales at the supermarket, a 10.2% increase from the previous year. It is growing for two reasons. One is that

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

consumers want to purchase the products at the same place that they buy their other grocery needs. The second is that suppliers are adding new packaging that fits into a supermarket planogram.

"We see a lot of suppliers changing packaging and promoting their products differently because they see an opportunity in the supermarket," says the West Coast retailer. "I expect that to continue because consumers are thinking differently."

As we always say in this spot, we encourage you to review our annual almanac and let us know your thoughts. We welcome your feedback.

Top 50 Supermarket Categories 52 weeks ended Jan.27 CATEGORY \$sales CHANGE UNIT VOLLME CHANGEVS. (milutions) VS. YEAR (MILIONS) YEAR AGO AGO Carbonated beverages 11.504.5 -2.1% 5,175.2 2.7% Milk 10.553.3 -2.7 3,608.6 -3.1 Fresh bread A rolls 9,356.8 -2.5 4,101.9 2.7 Sally snacks 8,871.9 2.8 3,596.8 0.2 Beer/ale /alcoholic 8,864.4 4.1 1,002.6 3.8 cider Natural cheese 7,967.5 2.4 2,474.4 2.3 Wine 6,515.5 4.2 727.2 2.2 Cold cereal 5,722.0 2.1 1,821.9 -3.4 Frozen dinners/entrees 5,567.1 4.1 2,135.5 -5.6 Yogurt 4,654.1 4.8 3,796.7 4.2 Bottled water 4,340.4 5.2 2,251.9 4.0 Ice cream/Sherbet 4,262.3 1.9 1,188.2 1.2 Refrigerated 4,259.8 1.1 1,460.1 -0.9 juices/drinks Coffee 4,229.1 7.5 633.9 5.2 Crackers 4,082.9 3.4 1,549.4 2.4 Cigarettes 4,035.3 -5.2 549.2 2.6 Cookies 3,873.1 2.8 1,474.6 1.0 Soup 3,786.5 0.7 2,909.0 3.7 Refrigerated fresh 3,450.2 1.6 1,526.4 -0.5 eggs Luncheon meats 3,450.2 -1.8 1,142.8 2.3 Breakfast meats 3,409.7 0.8 924.5 2.6 Bottled juices - shelf 3,294.4 -4.4 1,394.1 4.6 stable Total chocolate candy 3,242.3 3.4 1,713.2 -3.9 Toilet tissue 3,096.9 -0.2 587.3 -4.0 Dog food 3,064.9 -0.2 835.3 2.5 Refrigerated 2,917.3 1.3 1,086.2 0.7 salad/coleslaw Frozen pizza 2,813.2 4.0 909.0 -3.1 Spirits/liquor 2,757.2 12.3 183.8 11.7 Frozen novelties 2,743.3 0.0 874.4 -2.6 Laundr detergent 2,367.7 -3.0 368.5 -4.4 Frozen seafood 2,339.8 1.7 332.1 -1.7 Vegetables 2,327.0 0.2 2,238.0 -3.0 Snack/granola bars 2,265.9 4.3 972.0 5.6 Frozen/refrigerated 2,226.0 8.1 394.3 2.0 poultry Shortening & oil 2,136.9 0.5 468.0 -0.8 Spice a/seasonings 2,090.4 4.4 916.0 1.5 Baby 2,053.2 0.1 146.1 -8.1 formula/electrolytes Dinner sausage 2,052.9 3.5 559.5 4.0 Processed cheese 2,037.9 3.3 622.8 -5.3 Cat food 2,030.4 0.8 1,411.2 -4.2 Creams/reamers 1,962.1 3.8 721.5 1.0 Paper towels 1,879.2 -0.3 499.9 3.6 Processed 1,779.2 4.8 347.1 3.9 frozen/refrigerated poultry Frozen plain 1,777.1 -0.9 1,043.7 2.7 vegetables Snack nuts/seeds/com 1,771.0 10.2 493.7 1.3 nuts Frankfurters 1,721.0 -0.9 677.0 -3.4 Mexican foods 1,682.7 1.3 801.7 -0.3 Pastry/doughnuts 1,657.7 0.5 618.3 0.7 Frozen breakfast food 1,654.4 1.6 555.4 -1.9 Sports drinks 1,649.1 2.9 1,104.3 1.5

Natural Cheese Chunks

Private label continues to dominate and observers say that will not change. Kraft has 13.4% of dollars thanks to the company's association with cheese products. Many say that they expect sales to grow in this category for the foreseeable future.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$1,174.9 -1.7% 35.2% 328.7 -1.2% \$3.57 label Kraft 447.8 0.0 13.4 142.8 2.1 3.13 Foods Tillamook 217.8 4.8 6.5 38.9 2.3 5.59 County Creamery Cabot 169.3 10.0 5.0 51.5 12.0 3.28 Creamery Lactalis 150.6 -4.3 4.5 30.4 -5.3 4.94 USA Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (milutions) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$1,174.9 1.7% 35.2% 328.7 1.2% \$3.57 label Kraft 250.5 2.5 7.5 87.2 -5.5 2.87 Tillamook 179.4 1.6 5.3 32.3 0.1 5.55 Cabot 129.2 6.1 3.8 38.7 8.8 3.33 Vermont Kraft 115.1 7.2 3.4 34.6 29.4 3.33 Cracker Barrel Laughing 108.5 -1.5 3.2 23.7 -5.3 4.57 Cow Mini Babybel Crystal 93.7 0.0 2.8 37.3 -2.3 2.51 Farms Belgioioso 91.7 9.4 2.7 19.6 10.7 4.67 President 53.2 -3.0 1.6 9.0 5.4 5.88 Cacique 48.9 2.8 1.4 14.4 -0.8 3.38 Ranchero Category 3,328.8 1.4 884.4 1.2 3.76 total Source: SymphonyIRI Group

Natural Cheese Slices

The consumer fascination with cheese has definitely played a role in the growth of natural cheese slices. The category grew by 7.7% in dollars and 9.1% in units. Competition from a number of companies has helped keep price increases down.

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$595.7 5.4% 38.0% 217.8 5.3% \$2.73 label Sargento 425.7 16.2 27.2 142.2 18.7 2.99 Food Co. Kraft 155.3 5.2 9.9 52.5 12.5 2.90 Foods Tillamook 63.4 -1.9 4.0 13.2 4.2 4.78 County Creamery Belgioioso 33.3 18.3 2.1 4.7 19.9 \$7.07 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (milutions) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$595.7 5.4% 38.0% 217.8 5.3% \$2.73 label Sargento 289.1 25.2 18.4 95.6 28.3 3.02 Sargento 111.6 -2.4 7.1 37.8 -1.0 2.95 Deli Style Kraft Big 65.2 16.3 4.1 23.7 19.7 2.75 Slice Tillamook 63.1 -2.0 4.0 13.1 -4.5 4.79 Kraft 38.2 -20.6 2.4 12.0 19.6 3.17 Belgioioso 33.3 18.3 2.1 4.7 19.9 7.07 Crystal 25.6 24.2 1.6 8.2 26.7 3.13 Farms Castle Wood 25.2 0.7 1.6 2.7 3.6 9.12 Reserve Sargento 24.9 18.2 1.5 8.7 24.4 2.84 Natural Blends Category 1,564.5 7.7 492.8 9.1 3.17 total Source: SymphonyIRI Group

Natural Shredded Cheese

Private label sales are the clear leader in the \$4.1 billion category. Store brands captured almost 60% of dollars. Kraft was the top national brand, at 17.6% market share, up 2.4%. Overall the category was up 3.7% in dollars and 2.5% in units.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Nestle \$699.1 2.2% 78.4% 581.6 4.9% \$1.20 HealthGare Nutrition Beech-Nut 98.6 10.9 11.1 152.3 15.0 0.65 Corp. The Hain 47.4 -5.5 5.3 46.4 -4.9 1.02 Celestial Group Private 21.4 10.6 2.4 24.8 9.5 0.87 label Bay 5.6 -27.4 0.6 11.6 -31.1 0.48 Valley Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (milutions) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$2,433.4 2.8% 59.1% 790.6 1.5% \$3.08 label Kraft 726.6 2.4 17.6 245.0 0.7 2.96 Sargento 306.4 1.7 7.4 103.1 0.5 2.97 Crystal 127.4 7.7 3.1 47.7 8.4 2.96 Farms Kraft 93.3 41.8 2.2 33.9 36.1 2.75 Philadelphia Borden 62.9 6.2 1.5 27.2 6.0 2.31 Sargento 35.2 -8.2 0.8 12.4 -8.7 2.80 Artisan Blends Dr Giorno 27.8 -5.7 0.6 6.1 -9.5 4.50 Tillamook 27.1 0.9 0.6 7.6 -7.5 3.54 Stella 23.9 6.8 0.5 6.4 5.5 3.70 Category total 4,111.6 3.7 1,351.8 2.5 3.04 Source: SymphonyIRI Group

Refrigerated Bacon

There is a growing battle for bacon in the consumer's refrigerator. While private label holds a slight lead over Kraft for first place, Hormel is inching up with its own brands. Still, Oscar Meyer is the top selling brand.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE VENDORS (MILLIONS) VS. (MLLIONS) VS. PER UNIT YEAR YEAR AGO AGO Private \$745.8 2.5% 20.5% 192.0 4.6% \$3.88 label Kraft 736.5 -4.5 20.3 166.7 -6.7 4.42 Foods Hormel 442.8 1.7 12.2 93.1 0.9 4.75 Foods Wright 260.0 13.6 7.1 30.6 19.7 8.49 brand Foods Farmland 184.8 10.3 5.1 47.9 14.8 3.85 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (milutions) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$745.8 2.5% 20.5% 192.0 4.6% \$3.88 label Oscar 726.6 -5.2 20.0 163.5 -7.7 4.44 Mayer Hormel 322.7 -0.4 8.9 65.9 -1.5 4.89 Black Label Wright 256.3 13.9 7.0 30.4 19.9 8.43 Farmland 180.8 11.2 4.9 46.6 16.7 3.87 Smithfield 143.8 18.0 3.9 36.7 30.8 3.92 Gwaltney 114.8 -1.4 3.1 33.4 2.9 3.43 Bar-S 90.9 -5.4 2.5 29.6 -2.6 3.07 Hormel 90.5 5.6 2.5 20.2 4.4 4.48 Butterball 65.2 14.9 1.8 28.4 14.3 2.29 Everyday Category 3,628.0 1.2 888.4 2.3 4.08 total Source: SymphonyIRI Group

Refrigerated Frankfurters

Brand names dominate this segment, with Ball Park, Oscar Meyer, Bar-S and Hebrew National all posting solid market share numbers. Units fell slightly but dollars picked up a bit suggesting price increases during the tracked period.

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Hillshire \$608.2 1.5% 23.8% 179.2 0.5% \$3.39 Brands Kraft 526.2 -5.2 20.6 173.1 -11.0 3.04 Foods Bar-S 326.7 2.0 12.8 279.2 -1.7 1.17 Foods Co. ConAgra 188.1 -5.2 7.3 43.9 -9.3 4.28 Foods Specialty 176.2 14.7 6.9 43.5 16.6 4.04 Foods Group Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (milutions) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Ball Park \$567.1 2.0% 22.2% 162.2 1.1% \$3.49 Oscar 526.2 -5.2 20.6 173.1 -11.0 3.04 Mayer Bar-S 323.5 2.2 12.6 278.7 -1.7 1.16 Hebrew 188.1 -5.2 7.3 43.9 -9.3 4.28 National Nathan's 169.2 15.5 6.6 39.4 19.0 4.30 Famous Private 97.2 5.3 3.8 39.4 -4.0 2.47 label Gwaltney 67.7 0.5 2.6 44.6 -8.2 1.52 Sabrett 32.0 5.2 1.2 5.7 6.1 5.54 Eckrich 27.0 -0.8 1.0 15.2 4.1 1.78 Gwaltney 26.4 7.1 1.0 6.9 -1.9 3.83 Great Dogs Category 2,553.0 0.8 1,011.7 -2.8 2.52 total Source: SymphonyIRI Group

Refrigerated Sliced Lunchmeat

Not surprisingly, Oscar Meyer dominated sales in the lunchmeat category during the tracked period. However, this mature category is not seeing much growth and that has some retailers concerned. Can some company spark some growth in the lunch-meat segment?

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Kraft \$2,071.2 0.0% 38.7% 605.5 -1.0% \$3.42 Foods Private 774.8 -2.5 14.5 250.9 -0.4 3.09 label Hillshire 643.5 -6.5 12.0 175.9 -4.8 3.66 Brands Land 415.2 5.1 7.7 113.3 4.0 3.66 O'Frost Bar-S 176.3 8.5 3.3 100.1 14.9 1.76 Foods Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (milutions) VS. (MLLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Oscar Mayer \$1,165.1 -1.6% 21.8% 367.7 -2.3% \$3.17 Oscar Mayer 818.9 1.9 15.3 215.8 1.0 3.80 Deli Fresh Private 774.6 -2.5 14.5 250.9 -0.4 3.09 label Hillshire 427.3 -19.5 8.0 117.7 -17.9 3.63 Farm Deli Select Land 302.0 4.3 5.6 74.6 6.5 4.04 O'Frost Premium Bar-S 170.9 8.9 3.2 99.1 15.2 1.72 Castle 148.5 -0.3 2.7 18.8 -3.5 7.87 Wood Reserve Buddig 99.7 -7.7 1.8 123.8 -6.1 0.81 Hormel 99.7 7.7 1.8 32.8 5.6 3.04 Natural Choice Oscar Mayer 87.1 2.2 1.6 22.0 -1.2 3.95 Carving Board Category 5,342.9 -0.5 1,740.3 -0.8 3.07 total Source: SymphonyIRI Group

Dry Dinner Mixes (without meat)

General Mills' Betty Crocker brand has a huge lead in market share1 but its dollars fell by more than 12%. Kraft's Velveeta Cheesy Skillets might have been some of the reason, showing a 98% increase.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT General \$339.2 -12.6% 70.2% 210.2 -11.7% \$1.61 Mills Kraft 93.1 98.9 19.2 42.7 74.6 2.18 Foods Private 19.6 -14.2 4.0 15.5 -16.7 1.20 label Golden 14.6 -12.9 3.0 13.4 -9.3 1.09 Grain Macaroni Co. ConAgra 6.1 21.8 1.2 1.8 31.4 3.20 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Betty \$260.4 2.6% 53.9% 164.4 -5.2% \$1.58 Crocker Hmbrgr Helper Kraft 92.8 98.4 19.2 42.6 74.2 2.10 Velveeta Cheesy Skillets Betty 34.5 -14.2 7.1 21.6 -18.2 1.59 Crocker Tuna Helper Private 19.6 -14.2 4.0 15.5 -16.7 1.26 label Pasta 14.6 -7.9 3.0 13.4 -6.4 1.09 Roni Betty 10.0 -12.7 2.0 6.7 -12.6 1.48 Crocker Chicken Helper Betty 8.9 -12.2 1.8 5.0 -19.0 1.77 Crocker Asian Chckn Helper Betty 7.5 -33.5 1.5 4.9 -33.7 1.53 Cracker whie gm Hmbrgr Hlpr Progresso 6.6 5,872.0 1.3 1.9 6,420.1 3.46 Kitchen Favorites Zatarain's 5.6 19.5 1.1 3.3 23.1 1.68 Category 482.9 -1.1 289.6 -4.2 1.67 total Source: SymphonyIRI Group

Dry Macaroni and Cheese Mixes

A combination of steady sales growth and a jump in prices helped the category post a solid 7.3% gain in dollars. Kraft, well known for its product in this category had a 79% market share. Private label had a 13.9% share.

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Kraft \$938.7 6.0% 79.0% 494.5 -0.4% \$1.90 foods Private 165.2 5.7 13.9 163.4 -4.9 1.01 label Annie's 69.3 20.5 5.8 33.2 21.8 2.08 General 5.5 N/A 0.4 6.1 N/A 0.89 Mills S T 4.8 33.7 0.4 8.7 -4.7 0.55 Specialty Foods TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Kraft \$433.2 5.8% 36.4% 276.6 1.2% \$1.57 Kraft 319.9 9.4 26.9 131.5 3.2 2.43 Velveeta Private 165.2 5.7 13.9 163.4 -4.9 1.01 label Kraft 118.6 8.4 9.8 50.7 4.3 2.30 Deluxe Annie's 81.8 20.9 5.2 31.0 21.8 \$1.99 Homegrown Kraft 37.4 -7.6 3.1 11.6 -11.6 3.22 Easy Mac Anne'a 7.5 17.7 0.8 2.2 21.8 3.42 Homegrown Deluxe Betty 5.5 N/A 0.4 6.1 N/A 0.89 Crocker Category 1,188.0 7.3 710.0 0.1 1.67 total Source: SymphonyIRI Group

Shredded Processed/Imitation Cheese

Though not a huge category, sales continue to climb. Kraft topped the category with 34.8% market share, up 13.2%. Private label was a close second at 28.4%, which was down 11.3% from last year.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Kraft \$16.8 13.2% 34.8% 7.3 27.7% \$2.29 Foods Private 13.7 -11.3 28.4 7.7 -11.8 1.78 label Galaxy 6.4 4.4 13.2 1.7 2.2 3.57 Nutritional Foods Dairy 3.9 -12.9 8.2 2.6 -12.0 1.47 Farmers of America Roma 1.9 75.9 3.9 .527 42.6 3.61 Pizza Works Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Kraft \$16.0 41.5% 33.2% 7.0 63.3% \$2.28 Velveeta Private 13.7 -11.3 28.4 7.7 -11.8 1.78 label Galaxy 8.0 3.4 12.5 1.7 1.3 3.54 Nutritional Foods Veggie Borden 2.2 -11.7 4.7 1.9 -11.2 1.19 Ched 0-Mate American 1.8 26.8 3.8 .37 24.0 4.91 Accent Borden 1.6 -15.3 3.3 .71 -15.7 2.27 Cheddar Melt Imo's 1.2 11.9 2.4 .36 -1.1 3.31 Whitehall Specialties .788 -8.4 1.6 .14 -13.7 5.58 Kraft .748 -78.8 1.5 .30 -79.2 2.52 Imo's Provel .700 9,624.1 1.4 .16 7,434.4 4.26 Category 48.3 2.6 21.4 2.7 2.26 total Source: SymphonyIRI Group

Bottled Fruit Juice Blend (Shelf Stable)

The category struggled mightily, down 14.1% in dollars and 13.7% in units. Some of the smaller brands did enjoy success, including Langer's, Zico and Apple & Eve.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Campbell \$99.8 -18.8% 29.6% 33.0 -15.1% \$3.02 Soup Co. Nestle 77.4 -5.7 23.0 24.7 -6.6 3.13 USA Welch 42.0 -23.7 12.5 8.9 -33.3 4.72 Foods Private 30.9 -20.9 9.2 11.5 -22.3 2.68 label In Zone 16.1 -8.8 4.7 6.0 -6.9 2.64 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT V8 V \$98.5 -18.8% 29.3% 32.9 -15.1% \$2.99 Fusion Nestle 77.3 -5.6 23.0 24.7 -6.4 3.13 Juicy Juice Welch's 42.0 -23.7 12.5 8.9 -33.3 4.72 Private 30.9 -20.9 9.2 11.5 -22.3 2.68 label Belly- 16.1 -8.8 4.7 6.0 -5.9 2.64 washers Old 9.4 -18.6 2.8 3.6 -20.7 2.54 Orchard Langer's 8.5 80.1 2.5 3.4 94.9 2.49 Zico 5.7 11.6 1.7 2.4 14.1 2.33 Apple 3.6 33.0 1.0 .76 -19.0 4.76 & Eve Tree Top 3.5 -8.9 1.0 1.2 -18.9 2.91 Category 336.3 -14.1 107.5 -13.7 3.13 total Source: SymphonyIRI Group

Bottled Juice and Drink Smoothies (Shelf Stable)

With V8 holding a resounding lead in market share, the Campbell's continues to dominate the segment. Observers say that there is room for smaller companies to grab share by offering new concoctions.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Campbell \$30.4 36.5% 71.6% 11.6 26.2% \$2.81 Soup Co. South 6.7 -17.5 15.9 5.7 -17.3 1.18 Beach Beverage Co. Starbucks 2.3 6.3 5.5 .58 5.7 4.10 Coffee Co. Ella's 1.7 37.3 4.1 1.2 37.7 1.44 Kitchen Revolution .921 .12.1 2.1 .234 -6.2 3.93 Foods Product Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP

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\$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE
 YEAR YEAR PER AGO AGO UNIT V8 V \$18.7 89.1% 44.1% 6.1 82.3% \$3.03 Fusion V8 Splash 11.6 -5.6 27.4 5.4
 -6.4 2.14 Smoothies SoBe 6.7 -17.5 15.9 5.7 -17.3 1.18 Smooth Ella's 1.7 37.3 4.1 1.2 37.7 1.44 Kitchen Vivano
 1.7 8.2 4.0 .42 7.6 4.09 Strawberry Banana Revolution .92 -12.1 2.1 .23 -6.2 3.93 Foods Mashup's Vivano .64 1.4
 1.5 .16 0.8 4.10 Banana Chocolate VIP .07 1.7 0.1 .04 0.7 1.99 Squeez R .05 -33.7 0.1 .050 -38.8 1.11 Sunkist .05
 -19.2 0.1 .02 -11.0 2.40 Light Category 42.4 20.2 19.5 8.4 2.18 total Source: SymphonyIRI Group

Bottled Fruit Drinks (Shelf Stable)

As consumers seek healthy alternatives, the segment has suffered. Brand leader Hawaiian Punch was down 14.7% in dollars. Campbell's V8 Splash showed a solid double-digit dollar gain.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Dr Pepper/ \$437.6 -8.8% 27.2% 214.3 -8.1% \$2.04 Snapple Group 244.0 0.7 15.2 100.3 3.1 2.43 Campbell Soup Co. Tampico 125.8 0.7 7.8 83.7 1.4 1.50 Beverages Welch 120.9 4.2 7.5 42.2 10.3 2.86 Foods Private 93.6 6.6 5.8 55.6 2.2 1.68 label Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Hawaiian \$311.9 -14.7% 19.4% 150.4 15.3% \$2.07 Punch V8 Splash 166.6 13.8 10.3 72.1 14.0 2.31 Tampico 125.8 0.9 7.8 83.7 1.7 1.50 Private 93.6 6.6 5.8 55.6 2.2 1.68 label Welch's 66.8 -8.5 4.1 205 -10.4 3.25 Kool Aid 62.4 -4.2 3.8 59.4 -4.4 1.05 Bursts Snapple 61.2 14.7 3.8 36.9 25.1 1.66 SunnyD 52.8 52.0 3.3 22.9 38.8 2.30 V8 V 46.9 -11.4 2.9 15.2 -7.2 3.07 Fusion Light Motts 46.2 7.5 2.8 17.5 4.6 2.63 for Tots Category 1,604.7 -0.5 899.4 -0.6 1.78 total Source: SymphonyIRI Group

Domestic Beer

Domestic beer sales gained momentum, with a dollar sales increase of more than 4.5% versus last year. Case sales were up nearly 2.0%. Bud Light and Coors Light sales topped the \$1 billion mark while other labels such as Michelob Ultra, Yuengling, Sam Adams and Shock Top Belgian White Ale performed admirably as well.

Total U.S. sales through supermarkets, drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS \$ SALES CHANGE VS. CASES CHANGE VS. AVG. (MILLIONS) YEAR AGO (MILLION) YEAR
 AGO PRICE PER CASE Bud Light \$ 1,938.5 0.5% 107.0 -0.2% \$18.11 Coors Light 1,012.4 5.6 55.9 4.6 16.10
 Miller Lite 866.1 0.0 46.2 0.7 17.94 Budweiser 735.6 -3.7 40.5 -4.3 16.16 Natural 355.4 -3.5 24.6 -5.6 14.41 Light
 Michelob 346.9 9.0 157 5.7 21.98 Ultra Light Busch Light 304.5 2.3 21.4 0.4 14.21 Miller High 204.2 -3.9 13.6 5.3
 14.75 Life Busch 194.9 -1.8 13.3 -4.0 14.63 Keystone 184.1 4.8 13.4 -5.9 13.72 Light Bud Light 169.9 11,771.4 6.9
 12,319.2 24.34 Platinum Lager Bud Light 150.0 -6.1 6.1 -6.6 24.38 Lime Blue Moon 127.3 6,4 4.3 5.4 29.52 Belgian
 White Ale Yuengling 125.0 12.1 6.1 11.0 20.35 Traditional Lager Pabst Blue 118.6 22.6 7.7 20.9 15.26 Ribbon
 Natural Ice 99.6 -3.5 6.9 -5.6 14.37 Miller 94.9 -10.7 5.3 -9.9 17.89 Genuine Draft Samuel Adams 92.6 10.6 3.0 7.9
 30.43 Seasonal Coors 91.7 9.2 5.1 9.8 17.87 Milwaukee's 74.0 -5.7 5.7 -6.9 12.77 Seat Light Miller 64 73.7 -5.5 4.0
 -5.0 18.10 Budweiser 70.5 -15.7 37 -15.0 18.74 Select 55 Sierra Nevada 69.1 8.2 2.2 7.0 30.91 Pale Ale Samuel
 Adams 59.9 -4.5 2.0 6.8 29.93 Boston Lager Shock Top 58.5 41.3 2.1 40.9 27.36 Belgian White Ale Icehouse 58.2
 4.6 3.8 -4.7 14.93 Budweiser 49.1 -18.9 2.7 -18.7 18.03 Select Milwaukee's 47.5 3.7 3.7 2.5 12.69 Best Ice Rolling
 Rock 46.1 12.6 2.4 26.0 18.47 Samuel Adams 45.9 16.6 1.5 14.4 26.84 Variety Pack Leinenkugel 45.5 61.5 1.6
 62.9 27.13 Seasonal New Belgium 44.6 3.6 1.4 2.9 31.32 Fat Tire Amb Ale Blue Moon 43.7 -3.8 1.4 -4.7 30.46
 Seasonal Bud Ice 43.1 4.0 2.6 4.7 16.48 Steel Reserve 37.9 7.1 2.3 4.4 6.19 High Grvity Lgr Total 9,714.3 4.6
 515.1 1.98 18.66 Source: SympiwnyIRI Group

Imported Beer

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On the import side, dollar sales and case sales were both up (3.3% and 3.0% respectively) versus last year. Some of the biggest gainers include Dos Equis XX Lager Especial, Stella Artois Lager, Guinness Black Lager, Tecate Light and Newcastle Seasonal The top sellers were Corona Extra and Heineken.

Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27.

TOP BRANDS \$ SALES CHANGE CASES CHANGE AVG. (MILLIONS) VS. YEAR (MILLION) VS. YEAR PRICE AGO AGO PER CASE Corona Extra \$555.4 0.7% 20.4 0.3% \$27.13 Heineken 347.0 0.0 12.7 0.6 27.31 Modelo 174.5 26.6 7.1 25.0 24.40 Especial Corona Light 153.0 2.0 5.9 2.5 27.34 Stella Artois 126.9 24.7 3.6 25.6 32.96 Lager Dos Equis XX 103.7 22.9 3.7 20.8 27.56 Lager Especial Tecate 94.9 -2.6 5.3 0.6 17.70 Guinness 57.5 1.4 1.6 1.6 33.86 Draught Newcastle 57.3 -2.8 1.9 -1.6 29.85 Brown Ale Heineken 53.4 -9.2 1.9 -8.1 27.77 Premium Light Lager BECKA 46.6 -9.8 1.7 -9.7 26.71 Pacifico 46.6 3.7 1.7 4.7 26.38 Labatt Blue 43.0 -7.4 2.3 -7.1 18.21 Labatt Blue 38.2 -3.7 2.2 -3.8 17.37 Light Foster's 30.5 -2.5 1.2 2.5 23.81 Lager Negra Modelo 28.9 10.9 1.0 12.4 28.74 Guinness 26.2 3.6 .75 3.9 35.04 Extra Stout Amstel light 26.0 -8.8 .90 -8.7 28.65 Dos Equis XX 25.7 1.6 .93 1.0 27.68 Ambar Lager Red Stripe 24.4 -5.7 .86 -4.4 28.56 Molson 16.6 -9.0 .84 .82 19.65 Canadian Beers of 16.5 120.5 .68 92.4 24.49 Mexico Variety Pack Tec ale 14.8 20.3 .87 24.4 17.04 Light Victoria 12.5 -31.4 .43 -31.1 29.30 Peroni Nastre 11.5 12.7 .35 11.2 32.95 Azzurro Bass Ale 11.5 -15.4 .39 -15.0 29.01 Guinness 11.5 125.2 .35 143.9 32.79 Black Lager Foster's 11.4 11.4 .49 11.2 23.38 Premium Ale St Pauli 11.1 -29.0 .41 -30.4 27.20 Girl Hoegaarden 10.6 13.5 .29 13.0 36.07 White Ale Newcastle 9.7 126.2 .33 128.5 29.32 Seasonal Sapporo 9.5 5.6 .27 4.8 35.21 Premium Draft Pilsner 6.5 -13.5 .26 15.8 32.67 Urquel Smithwick's 7.3 -10.6 .22 -9.5 32.27 Irish Ale Presidente 7.2 -12.9 .31 -15.6 23.30 Pitsener Total 2,424.2 3.3 91.2 3.0 26.58 Source: SymphonyIRI Group

Ground Coffee

Starbucks was the biggest winner, up 7.9% in dollars and 8.1% in units. Other gainers included Community and Chock Full O' Nuts. Top brand Folgers accounted for 32% of category sales, neary double that of number two Maxwell House.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. YEAR (MILLIONS) VS. YEAR PRICE AGO AGO PER UNIT J M Smucker \$1,801.6 -4.4% 41.0% 230.3 -5.4% \$7.82 Co. Kraft 870.1 4.2 19.8 131.0 5.8 8.64 Foods Private 447.7 -0.3 10.2 80.4 -3.4 5.57 label Starbucks 340.3 3.5 7.7 38.6 3.2 8.82 Coffee Co. Massimo 177.2 3.4 4.0 34.6 7.3 5.12 Zanetti Beverage USA Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. I \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. YEAR (MILLIONS) VS. YEAR PRICE AGO AGO PER UNIT Folgers \$1,407.2 -3.7% 32.0% 182.3 4.6% \$7.72 Maxwell 720.5 -4.7 16.4 110.6 2.7 6.51 House Private 447.7 -0.3 10.2 80.4 3.4 5.57 label Starbucks 335.3 7.9 7.8 38.0 8.1 8.83 Dunkin' 294.8 -1.8 6.7 30.7 -0.1 6.60 Donuts Eight 99.4 -0.8 2.3 17.4 -3.2 5.70 O'Clock Community 86.5 4.1 2.0 12.1 -2.2 7.12 Chock Full 83.3 2.4 1.9 17.1 7.8 4.86 O'Nuts Peets 82.3 3.9 1.9 8.7 5.2 9.49 Coffee Gevalia 76.6 2.320.8 1.7 10.9 2,545.4 7.02 Category 4,397.1 -0.3 646.5 -1.1 6.80 total Source: SymphonyIRI Group

Instant Decaffeinated Coffee

Eight of the top ten brands were down versus last year. Despite losing almost 5% of dollar sales, top brand Folgers increased units sales by 10.6%. The only brands to see dollar gains were Nescafe Classico and Starbucks Via, up 13.8% and 17.3% respectively.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT J M Smucker \$43.0 -4.7% 37.1% 9.5 10.6% \$4.52 Co. Nestle USA 30.6 -4.5 26.4 5.7 -18.5 5.33 Kraft 25.0 12.7 21.6 5.9 -12.3 4.24 Foods Private 12.3 -8.0 10.6 2.5 -8.1 4.85 label Starbucks 3.8 17.3 3.3 0.5 13.6 8.30 Coffee Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Folgers \$43.0 -4.7% 37.1% 9.5 10.6% \$4.52 Nescafe Tasters 20.9 -10.4 18.1 4.0 -26.5 5.22 Choice

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Private label 12.3 -8.0 10.6 2.5 -8.1 4.85 Maxwell House 10.2 -17.3 8.6 3.3 -14.9 3.13 International Nescafe 9.6 13.8 8.3 1.7 11.8 5.59 Clasico Maxwell House 6.8 -7.6 7.6 1.5 -7.0 5.96 Maxwell House 5.9 -10.9 5.1 1.1 -10.3 5.18 Sanka Starbucks Via 3.8 17.3 3.3 .46 13.6 8.30 Cafe Bustelo .26 -5.0 0.2 .06 -9.4 4.38 Community .26 -6.9 0.2 .04 -7.9 6.51 Category total 1157 -6.7 24.4 -6.0 4.74 Source: SymphonyIRI Group

Single Cup Coffee

The single cup coffee category exploded last year as dollars were up more than 89%. The category leader was Green Mountain with 24.4% of sales, up 62.6% from a year ago. Starbucks was the top gainer, up more than 650%.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Green \$956.5 64.4% 55.3% 87.0 66.1% \$10.99 Mountain Coffee Roasters J M Smucker 341.8 97.9 19.8 33.9 90.7 10.07 Co. Starbucks 238.3 655.1 13.8 21.4 741.4 11.16 Coffee Co. Diedrich 111.6 79.2 6.4 10.2 83.5 10.98 Coffee Kraft 27.0 6.0 1.6 3.6 -15.9 7.42 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Green \$421.5 62.6% 24.4% 41.4 71.5% \$10.18 Mountain Folgers 267.1 95.6 15.4 25.7 87.2 10.38 Gourmet Selections Starbucks 238.2 654.8 13.8 21.3 741.1 11.16 Donut House 129.8 148.1 7.5 10.7 106.3 12.10 Collection Newman's Own 126.2 36.9 7.3 8.4 27.8 15.07 Organics Donut Shop 82.7 105.8 4.8 7.5 110.9 10.97 Coffee People Keurig 80.7 25.3 4.7 6.2 21.9 13.01 Caribou Coffee Millstone 74.7 106.9 4.3 8.2 102.7 9.08 Tully's 60.0 -0.8 3.5 6.8 0.0 8.84 Coffee Barista Prima 35.6 479.0 2.1 3.4 583.1 10.51 Coffeehouse Category 1,730.5 89.3 163.9 84.3 10.56 total Source: SymphonyIRI Group

Doughnuts

Little Debbie was not so little last year, as the brand was the top gainer up 39.8% in dollars. Consumers looked to private label a bit less as dollars were off 3.5%. Not surprisingly, all Hostess products saw a significant dip as well.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Bimbo \$260.5 8.0% 25.1% 84.6% 8.5% \$3.08 Bakeries USA Hostess 198.4 -14.6 19.1% 101.1 -13.3 1.96 Brands Private 189.6 -3.5 18.2 83.5 -6.1 2.27 label Krispy 158.5 3.0 15.3 39.7 1.5 3.99 Kreme Doughnut Co. McKee 86.2 39.9 8.3 51.2 32.2 1.68 Foods Corp. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$189.6 -3.5% 18.2% 83.5 -6.1% \$2.27 label Krispy 153.0 2.6 14.7 37.8 0.9 4.05 Kreme Hostess 146.2 -14.4 14.1 77.7 -13.3 1.88 Donettes Entenmann's 119.0 7.4 11.4 35.0 6.3 3.40 Little 86.2 39.8 8.3 51.2 32.2 1.68 Debbie Entenmann's 69.1 6.3 6.6 19.9 4.9 3.46 Softee's Entenmann's 43.4 19.8 4.2 16.7 27.2 2.60 Pop 'ems Blue Bird 26.5 0.8 2.5 15.1 -2.3 1.76 Hostess 25.9 -14.9 2.5 12.2 -15.0 2.13 Sweet Sixteen Hostess 19.2 -13.9 1.8 7.6 -9.8 2.53 Category 1,039.5 2.4 419.9 1.0 2.48 total Source: SymphonyIRI Group

Refrigerated Orange Juice

Tropicana held the top brand with its Pure Premium products, with \$945.2 million in sales. Minute Maid was up 152.1% in dollars though Minute Maid Premium was down 17.7%. Overall, the category was flat in dollars, down 2.7% in units.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Coca \$1,081.0 0.4% 33.0% -2.9% 311.2 \$347 Cola Co. Tropicana 989.6 -1.1 30.2 -5.1 3.80 260.3 Dole Beverages Private 555.4 -2.4 17.0 196.8 -0.8 2.82 label Citrus 428.3 6.7 13.1 127.6 1.3 3.36 World Sweeney 38.5 0.8 1.2 17.3 4.3 2.23 Enterprises Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Tropicana \$945.2 -1.6% 28.9% 245.2 -5.9% \$3.86 Pure Premium Simply 652.5 1.3 19.9 181.8 -1.0 3.59 Orange Private 555.4 -2.4 17.0 196.8 -0.8 2.82 label Florida's 402.3 7.7 12.3 116.4 2.1 3.46 Natural

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Minute 294.3 -17.7 9.0 85.6 -21.6 3.44 Maid Premium Minute 91.2 152.1 2.8 30.2 153.7 3.02 Maid Homemaker 38.5 0.8 1.2 17.3 4.3 2.23 Minute 36.6 -6.6 1.1 11.3 -11.4 3.23 Maid Premium Kids Plus Dole 19.2 64.9 0.6 7.5 48.7 2.56 Citrus 18.2 -0.7 0.6 7.9 0.3 2.31 World Donald Duck Category 3,272.8 -0.3 971.8 -2.7 3.37 total Source: SymphonyIRI Group

Ready-to-Eat Cereal

Kellogg's (30.6%) and General Mills (30.1%) continue to go neck and neck for cereal supremacy. However, private label sales outdid all brands, capturing 9.0% of dollars. though units did regress nearly 3.5%. Overall, the category remained flat.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Kellogg Co. \$2,896.4 0.3% 30.6% 829.9 -1.4% \$3.24 General 2,858.3 -1.6 30.1 854.1 -3.6 3.35 Mills Post 984.4 -4.0 10.4 311.1 -6.3 3.16 Holdings Pnvtate 857.8 0.1 9.0 348.8 3.4 2.46 label Mom 653.2 5.1 6.9 171.8 -0.9 3.80 Brands Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$857.8 0.1% 9.0% 348.8 -3.4% \$2.46 label General 543.1 1.4 5.7 151.4 -0.8 3.59 Mills Hny Nt Cheerios Kelloggs 435.1 9.4 4.6 133.3 5.0 3.27 Frosted Flakes Post 392.6 -9.8 4.1 118.6 -12.6 3.31 Honey Bunches of Oats General 374.7 0.1 4.0 113.9 -2.6 3.29 Mills Cheerios General 292.8 -6.0 3.1 84.7 -12.3 3.45 Mills Cnnrnon Tst Crnch Kelloggs 287.3 1.3 3.0 85.1 1.0 3.38 Frosted Mini Wheats General 247.4 4.1 2.6 73.5 0.1 3.37 Mills Lucky Charms Kelloggs 225.6 -14.4 2.4 67.6 -15.0 3.34 Special K General 192.9 24.3 2.0 54.7 25.7 3.53 Mills Mitt Grn Cheerios Category 9,480.7 -0.2 2,957.4 -2.4 3.21 total Source: SymphonyIRI Group

Frozen Yogurt

Frozen yogurt sales continue to soar. Dollar and units were up 28.5% and 33.8% repsectively. Ben & Jerry's brands were the biggest gainers followed by Kemps. Like its ice cream counterpart, private label sales remained strong.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$59.1 19.9% 19.2% 19.0 32.9% \$3.10 label Ben & 49.1 118.5 16.0 14.0 133.4 3.49 Jerry's Homemade Dreyer's 42.8 -24.9 13.9 10.6 -26.9 4.03 Grand Ice Cream Hldngs Kemp's 28.6 17.8 9.3 7.6 17.9 3.76 Turtle 26.0 16.8 8.50 4.8 7.0 5.33 Mountain Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select dub and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE VS YEAR SHARE UNIT SALES (MILLIONS) AGO (MILLIONS) Private \$59.1 19.9% 19.2% 19.0 label Ben & 25.8 10,601,403.4 8.4 8.0 Jerry's Ben & Jerry's 23.2 3.4 7.5 6.0 Froyo Kemp's 18.6 27.8 6.0 5.0 Wells Blue 18.2 17.2 5.9 4.5 Bunny Dreyer's 17.3 -24.2 5.6 4.3 Edy's Slowchurned Healthy 13.7 N/A 4.4 4.7 Choice So Delicious 12.4 156.9 4.0 2.3 Haagen-Dazs 11.6 -29.0 3.8 2.9 Turkey Hill 9.9 -1.1 3.2 3.2 Category 306.9 28.5 84.1 total TOP BRANDS CHANGE VS AVG YEAR AGO PRICE PER UNIT Private 32.9% \$3.10 label Ben & 12,916,0981 3.22 Jerry's Ben & Jerry's 0.3 3.84 Froyo Kemp's 27.7 3.72 Wells Blue 13.7 4.00 Bunny Dreyer's -26.4 4.03 Edy's Slowchurned Healthy N/A 2.88 Choice So Delicious 145.4 6.31 Haagen-Dazs -31.2 3.97 Turkey Hill -1.9 3.10 Category 33.8 3.65 total Source: SymphonyIRI Group

Ice Cream

Ice cream continues to be a consumer favorite as sales increased 2.1% versus last year. Top gaining brands include Dryer's Edy's Grand, Breyers Blasts and Wells Blue Bunny. Private brand remained strong, accounting for more than 22% of sales.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$1,138.1 0.1% 22.4% 353.1 -1.2% \$3.22 label Dreyer's 960.6 -0.2 18.9 243.6 -2.9 3.94 Grand Ice Crm Hldngs Good 680.4 -8.1 13.4 187.8 -6.3 3.62 Humor/ Breyers Ice Crm Blue 501.9 7.3 9.9 123.7 6.2 4.06 Bell Creameries Wells 386.2 8.8 7.6 89.8 5.4 4.30 Dairy Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan.

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27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$1,138.1 0.1% 22.4% 353.1 -1.2 \$3.22 label Blue 501.9 7.3 9.9 123.7 6.2 4.06 Bell Breyers 473.8 -8.5 9.3 130.8 -8.4 3.62 Haagen-Dazs 318.9 8.9 6.3 77.0 5.9 4.14 Ben 314.4 2.3 6.2 83.0 -0.3 319 &Jerry's Dreyer's 295.1 -4.1 5.8 75.0 -6.7 3.93 Edy's Slowchurned Wells 289.7 9.3 5.7 67.9 6.0 4.26 Blue Bunny ice cream Dreyer's 182.3 26.5 3.6 47.7 23.6 3.82 Edy's Grand Turkey 180.8 7.0 3.5 60.7 6.5 2.98 Hill Broyers 106.2 16.9 2.1 30.2 16.8 3.51 Blasts Category 5,061.9 2.1 1,381.3 0.4 3.66 Source: SymphonyIRI Group

Sherbet/Sorbet/Ices

The category remained flat. Blue Bell was clearly the biggest brand gainer, up more than 13%. Kemp's and Talenti also had strong years. Private label captured the lion's share with more than 44% of sales.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$95.8 0.0% 44.1% 37.5 -3.5% \$2.55 label Dreyer's 42.4 -2.7 19.5 10.8 -6.3 3.92 Grand Ice Cream Blue 13.4 13.1 6.1 5.0 10.9 2.64 Bell Creameries Ciao 8.1 0.8 3.7 2.0 -3.2 3.92 Bella Gelato Co. Kemp's 7.4 7.2 3.4 2.5 4.8 2.98 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$95.8 0.0% 44.1% 37.5 -3.5% \$2.55 label Haagen- 32.1 -3.4 14.8 8.2 -7.4 3.90 Dazs Blue 13.4 13.1 6.1 5.0 10.9 2.64 Bell Dreyer's 8.9 -12.9 4.1 2.2 -14.4 3.98 Edy's Ciao 8.1 0.8 3.7 2.0 -3.2 3.92 Beta Kemp's 7.4 7.2 3.4 2.5 4.8 2.98 Wholefruit 5.7 -10.7 2.6 2.0 -8.0 2.77 Prairie 5.3 5.2 2.4 1.7 1.3 3.10 Farms Dean's 3.6 2.5 1.7 1.5 7.9 2.38 Talenti 3.6 5.9 1.6 .8 3.1 4.38 Category 217.2 0.3 75.3 -1.7 2.88 total Source: SymphonyIRI Group

Frozen Handheld Entrees (Non-breakfast)

The overall category was flat, but the top brands fared well. Sales for the top three (Hot Pockets, El Monterey and State Fair) were up 5.1%, 6.4% and 3.2% respectively. Smucker's Uncrustables was the biggest gainer, up 16.8%.

TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG, VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Nestle \$948.9 -4.3 39.4% 315.5 -6.6% \$3.01 USA Ruiz Food 268.8 5.3 11.1 90.9 -1.1 2.95 Products Hillshire 190.0 5.6 7.9 30.9 6.4 8.14 Brands Foster 119.5 7.1 4.9 20.0 1.9 5.98 Poultry Farms White 111.3 -3.1 4.6 20.6 -8.6 5.39 Castle System Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP VENDORS \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG, (MILLIONS) VS. (MILLIONS) VS. RICE YEAR YEAR PER AGO AGO UNIT Hot Pockets \$637.8 5.1% 26.5% 189.0 2.5% \$3.37 El Monterey 266.9 6.4 11.1 89.6 -0.5 2.98 State Fair 177.0 3.2 7.3 27.1 2.6 6.53 Lean Pockets 173.4 0.3 7.1 71 6 1.4 2.41 Foster Farms 119.4 7.2 4.9 19.9 1.9 5.98 White Castle 111.3 -3.1 4.6 20.6 -8.6 5.39 Smucker's 1084 16.8 4.5 24.8 10.2 4.42 Uncrustables Private label 94.3 -7.6 3.9 40.0 14.8 2.36 Jose Ole 54 3 -4.9 2.2 39.4 2.6 1.38 Amy's 47.7 16.0 1.9 18,0 137 2,65 Category 2,403.7 0.6 822.0 -1.9 2.92 total Source: SymphonyIRI Group

Frozen Pizza

Frozen pizza dollars and units were down 3.2% and 2.3% respectively. Two brands did enjoy success. Red Baron was up 6.3% and Jack's Original was up 2.9%. The DiGiomo brand accounted for 25% of market share.

TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG, VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Nestle \$2,049.6 -3.1% 47.3% 478.5 -1.8% \$4.28 USA Schwan 896.8 -6.5 20.7 270.5 1.9 3.32 Food Co. Private 430,0 -3.4 9.9 143.1 -1.7 2.94 label General 366.0 -3.7 8.5 278.7 7.0 1.32 Mills Pinnacle 75.2 -0.7 1.7 72.5 0.4 1.04 Foods Group Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP VENDORS \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG, (MILLIONS) VS. (MILLIONS) VS. RICE YEAR YEAR PER AGO AGO UNIT DiGiomo \$1,095.6 -3.9% 25.3% 195.6 -4.6% \$5.60 Red Baron 452.8 6.3 10.4 125.9 15.2 3.60 Private 430.0 -3.4 9.9 146.1 -1.7 2.94 label Tombstone 323.9 -2.3 7.4 90.5 1.9 3.58 Totino's 316.1 -3.1 7.3 237.7 -6.8 1.33

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Party Pizza Jack's 188.7 2.9 4.3 66.7 4.4 2.83 Original California 147.9 -14.0 3.4 29.7 -13.3 4.96 Pizza Kitchen Freschetta 140.0 -12.4 3.2 27.3 -5.2 5.12 Tony's 102.4 -18.6 2.3 47.1 -9.0 2.17 Siouffef's 90.2 -3.0 2.0 31.2 -2.4 2.89 Category 4,326.9 -3.2 1,373.9 -2.3 3.15 total Source: SymphonyIRI Group

Frozen Pizza

Crust/Dough Home made pizza seems to be catching on. Dollars are up more than 60%. Units are up nearly 45%. Udi's outpaced the category, up 83.5% in dollars. Category leader Freschetta also did well, up 45.5% in dollars.

TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Schwan Food \$7.2 45.4% 27.7% 1.8 41.6% \$3.94 Co. Private 4.8 1,301.6 18.4 1.5 694.9 3.02 label Udi's Denver 3.7 83.5 14.3 .720 84.1 5.18 Co. Kmnikrnnrck 1.2 -1.1 4.9 .166 -2.6 8.30 Foods Delimex .748 N/A 2.8 .150 N/A 4.98 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP VENDORS \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. (MILLIONS) VS. (MILLIONS) VS. RICE YEAR YEAR PER AGO AGO UNIT Freachetta \$7.2 45.4% 27.7% 1.8 41.6% \$3.94 Private 4.6 1,301.6 18.4 1.5 694.9 3.02 label Udi'a 3.7 83.5 14.3 -72; 84.1 5.18 Kinnikinnick 1.2 -1.1 4.9 .16 -2.6 8.30 Foods Delimex .74 N/A 2.8 -1.5 N/A 4.98 Tiaeо .73 3.2 2.7 .42 4.0 1.71 House of .70 -4.1 2.7 .26 5.4 2.68 Pasta Calise & .62 0.7 2.3 .42 0.9 1.49 Son's Bakery Stefano's .60 19.1 2.3 .34 17.6 1.78 Porteai .60 24.8 2.3 .12 11.2 4.94 Category 26.0 60.9 7.9 44.9 3.27 total Source: SymphonyIRI Group

Liquid Laundry Detergent

Innovations in the detergent category have led to declines in liquid laundry detergent sales. Dollars are down 4.3% while units are down almost 6.0%. Tide is the brand leader with more than 30.0% of market share. Average unit price increased to \$7.38.

TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. YEAR PRICE YEAR AGO PER AGO UNIT Procter & \$3,216.5 -4.7% 57.3% -4.9% -4.9% \$10.59 Gamble Church & 854.3 5.1 15.2 177.8 0.1 4.80 Dwight Co. Sun 826.0 -9.9 14.7 134.0 -12.1 6.16 Products Corp. The Dial 388.9 -3.5 6.9 79.3 -0.8 4.900 Corp. Private 169.3 -11.3 3.0 27.3 -20.9 6.20 label Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. YEAR PRICE YEAR AGO PER AGO UNIT Tide \$1,694.7 8.1% 30.2% 154.6 -8.5% \$10.96 Gain 661.0 -0.4 11.6 87.9 0.0 9.72 All 320.6 -10.4 5.7 39.6 -15.7 8.08 Purex 276.0 0.5 4.9 57.3 -4.6 4.81 Arm & 272.1 -0.9 4.8 47.8 -11.7 5.69 Hammer Tide plus 207.5 2.3 3.7 15.7 -0.9 13.17 Febresee Xla 186.7 0.5 3.3 52.6 1.6 3.54 Arm & 171.5 7.4 3.0 29.5 6.8 5.81 Hammer Plus Oxi Clean Private 169.3 -11.3 3.0 27.3 -20.9 6.20 label All 143.2 8.2 2.5 20.2 3.2 7.07 Oxi-active Category 5,604.4 -4.3 759.4 -5.9 7.38 total Source: SymphonyIRI Group

Paper Towels

Procter & Gamble has a stronghold on paper towels. The manufacturer controls 44.4% of the category with its various Bounty brands. Private label is a distant second with 26.2% of dollars. Average unit price topped \$4.50 for the category.

TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. YEAR PRICE YEAR AGO PER AGO UNIT Procter & \$2,140.7 0.8% 44.4% 302.5 2.4% \$7.07 Gamble Private 1,262.1 0.8 26.2 470.1 -1.6 2.68 label Georgia- 857.2 2.3 -17.8 161.6 4.0 5.30 Pacific Corp. Kimberly 497.6 5.4 10.3 103.6 2.6 4.80 Clark Corp. Marcal 19.5 -40.3 0.4 5.0 -35.8 3.89 Paper Mills Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. YEAR PRICE YEAR AGO PER AGO UNIT Private 1,262.1 0.8 26.2 470.1 -1.6 2.68 label Sparkle 487.9 5.0 10.1 107.7 8.6 4.53 Bounty 296.6 -2.7 6.1 68.6 5.4 4.32 Basic Kfeenex 261.3 2.7 5.4 55.3 -0.8 4.72 Viva Scott 167.1 6.8 3.4 32.2 6.3 5.18 Brawny 167.3 5.3 3.2 26.9 0.1 5.83 Brawny 94.4 -18.8 1.9 20.3 -9.6 4.64 Pick A Size Marathon

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82.8 16.5 1.7 2.9 14.0 27.76 Bounty 63.9 -14.6 1.3 7.7 -22.6 8.31 Extra Soft Category 4,816.8 1.3 1,068.5 -1.0 4.51 total Source: SymphonyIRI Group

Toilet Tissue

The big three toilet tissue manufacturers (Georgia-Pacific, Procter & Gamble and Kimberly Clark) were separated by less than 4.0%. Yet private label was tops on the brand side, up an impressive 9.4% in dollars versus a year ago.

TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. YEAR PRICE YEAR AGO PER AGO UNIT Georgia- \$2,384.5 -2.3% 26.5% 386.5 -5.8% \$6.17 Pacific Corp. Procter & 2,318.5 0.8 27.7 255.8 -1.6 0.06 Gamble Kimberly 2,079.6 2.1 24.8 306.1 -2.3 6.79 Clark Corp. Prrvle 1,442.8 9.4 17.2 407.B 4.5 3.54 label Marcal 43.2 -10.6 0.5 10.2 -25.1 4.22 Paper Mills Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHAKE UNIT SALES CHANGES AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. YEAR PRICE YEAR AGO PER AGO UNIT Private 1,442.8 9.4% 17.2% 407.8 4.5% \$3.54 label Angel Soft 1,300.0 -1.5 15.5 256.2 -5.0 5.07 Charmin 1,025.6 3.2 12.2 103.3 -2.1 9.93 Ultra Soft Scott 985.7 -0.9 11.8 155.0 6.7 6.36 Charmin 904.3 0.9 10.8 91.4 -0.8 9.89 Ultra Strong Quilted 682.6 0.4 8.1 64.1 -3.6 6.12 Northern Soft & Strong Kleenex 432.7 78.1 5.1 60.6 73.6 7.14 Cottonelle Clean Care Charmin 342.2 -6.4 4.1 55.3 -9.0 6.18 Basic Kleenex 306.6 7.6 3.6 39.1 9.9 7.83 Cottonelle Ultra Quilted 252.5 -9.9 3.0 35.0 -11.4 7.21 Northern Ultra Plush Category 8,356.6 1.4 1,397.8 -1.6 5.98 total Source: SymphonyIRI Group

Fresh Eggs

Store brands rule the roost when it comes to fresh eggs, controlling more than 50% of the \$4.7 billion category Eggland's Best is the best of the rest, with almost 12% of dollars. Egglands dollars were also up an impressive 13.4%

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT Private \$2,528.2 0.4% 53.8% 1,212.3 -1.1% \$2.09 label Eggland's 571.3 13.3 12.2 181.6 7.4 3.15 Best Country 389.4 4.7 8.3 168.9 0.7 2.30 Creek Farma Cal Maine 147.6S 13.0 3.1 S2.2 12.6 2.83 Foods Sunny 113. 8 -9.5 2.4 54.6 -11.8 2.09 Farms Corp. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT Private \$2,528.2 0.4% 53.8% 1,212.3 -1.1% \$2.09 label Eggland's 559.8 13.4 11.9 177.8 7.6 3.15 Best Great Day 193.4 -3.4 4.1 96.0 -5.1 2.01 Farmers Market Country 129.2 7.6 2.8 50.6 7.3 2.56 Creek Sunny 113.8 -9.5 2.4 54.6 -11 5 2.09 Farms Cal Maine 105.7 6.7 2.3 38.6 S.9 2.74 Sunup Land 62.7 -2.5 1.3 19.4 -0.8 3.23 O'Lakes Sauder's 53.3 -0.9 1,1 16.9 -8.2 2.62 Eggs Hi Han 4Q.1 25.2 1.0 26.2 23.4 1.87 dale Farms Dutch 43.6 165.8 0.9 27.3 185.6 1.60 Farms Category 4,695.5 3.0 2,074.5 0.2 2.26 total Source: SymphonyIRI Croup

Refrigerated Skim/Lowfat Milk

Skim/lowfat milk sales reached nearly \$10 billion yet were down 3% versus last year. Like whole milk, private label controlled the category with 63.4% of dollar share.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT Private \$6,170.5 -3.2% 63.4% 2,160.8 -3.0% \$2.86 label H P 393.7 -1.5 4.0 100.6 -3.2 3.91 Hood Dean 353.6 -1.9 9 123.7 -2.0 2.66 Foods Co. White 313.7 3.0 3.2 68.6 -2.1 4.56 wave Foods Co. Prairie 166.4 0.6 1.7 59.5 0.6 2.B0 Farms Dairy Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT Private \$6,170.5 -3.2% 63.4% 2,160.8 -3.0% \$2.86 label Horizon 311.6 4.4 3.2 68.2 -0.8 4.67 Organic Hood 307.8 0.7 3.2 72.3 -1.0 4.26 Lactaid Prairie 149.8 2.0 1.5 53.2 2.0 2 82 Farms Dean's 136.9 -3.1 1.4 40.7 -3.0 2.7B Land 123.6 0.6 1.3 43.2 -0.3 2.B6 O'Lakes Organic 96.3 2.9 1.0 22.5 -1.6 4.29 Valley Hiland 90.1 0.5 0.9 30.1

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0.0 2.99 Alta Dena 68.1 31.1 0.7 21.4 33.8 3.18 Country 66.9 -8.2 0.7 23.0 -7.9 2.91 Fresh Category 9,730.4 -3.0
3,286.4 -3.2 2.96 total Source: SymphonyIRI Croup

Refrigerated Whole Milk

Private label has "Got Milk" covered. Store brands account for more than 60.0% of whole milk sales. However, both dollars (-3.1) and units (-3.0) were down. The top brand was Horizon Organic. Average price per unit topped \$3.00.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS)
YEAR AGO PRICE AGO PER UNIT Private \$2,359.4 -3.1% 61.3% 794.9 -3.0% \$2.97 label White 133.2 7.5 3.5
29.6 3.3 4.50 wave Foods Co. Dean 113.9 1.0 3.0 36.4 1.6 2.07 Foods Co. H P Hood 96.3 0.2 2.5 24.4 -0.7 3.94
Milk 82.9 7.4 2.2 27.2 9.9 . 3.04 Products Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT
Private \$2,359.4 -3.1% 61.3% 794.9 -3.0% \$2.97 label Horizon 133.0 8.7 3.5 29.6 4.4 4.50 Organic Hood 75.0 1.2
1.9 17.0 0.7 4.41 Lactaid Borden 61.6 14.4 1.6 20.1 19.1 3.05 Hiland 54.1 3.7 1,4 18.0 4.2 3.01 Prairie 49.1 6.6 1.3
17.1 7.4 2.87 Farms Dean's 44.1 -3.2 1.1 15.9 -3.6 2.77 Oak 41.1 27.0 1.1 13.2 26.2 3.10 Farms Country 39.4 -4.8
1.0 125 -2.8 3.16 Fresh Land 34.6 0.5 0.9 11.7 0.4 2.95 O'Lakes Category 3,850.6 -1.7 1,266.3 -1.7 3.04 total
Source: SymphonyIRI Croup

Frozen Cooked Shrimp

One of the most popular foods in the frozen case, shrimp dollars were down 1.6%, though units were up slightly. Store brands accounted for almost 60% of dollars. despite the average price of \$7.68 was higher than the category average, \$7.53.

TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. (MILLIONS) VS YEAR (MILLONS)
YEAR AGO PRICE AGO PER UNIT Private \$682.0 -10.3 58.1% 88.8 -7.7% \$7.68 label Rich-Seapak 101.5 15.8
8.6 16.3 6.5 6.22 Corp. National 62.9 89.1 6.3 9.6 107.5 6.59 Fish & Seafood Tampa Bay 34.3 15.9 2.9 2.0 42.1
16.50 Fisheries Aqua Star 32.9 20.1 2.8 4.6 40.8 7.16 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT
Private label \$682.0 -10.3% 58.1% 88.8 -7.7% \$7.66 Seapak 101.5 15.8 8.6 16.3 6.5 8.22 Nobrand 81.0
97.2 5.2 9.2 116.9 6.59 Aqua Star 31.6 19.6 2.7 4.4 41.1 7.04 Nobrand 30.7 7.9 2.6 1.5 8.9 20.38 Chicken of the
276 149.6 2.3 5.0 179.3 5.51 Sea Sea Best 22.9 -4.6 1.9 3.1 -11.7 7.26 Cape Gourmet 14.8 5.4 1.2 .93 -3.8 15.98
Gorton's Shrimp 14.3 -0.3 1.2 2.3 -2.3 6.06 Temptations Margaritaville 11.7 26.9 1.0 1.9 18.7 6.16 Category total
1,172.1 -1.6 155.5 0.7 7.53 Source: SymphonyIRI Croup

Frozen Dinners/Entrees (Single-serve)

The category was down in both units (-4.8%) and dollars (-2.2%). Nestle and ConAgra were the top players with 32.3% and 29.8% market share respectively.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS)
YEAR AGO PRICE AGO PER UNIT Nestle \$1,497.6 -1.5% 32.3% 580.7 -2.8% \$2.58 USA ConAgra 1,363.4 -6.0
29.8 766.6 -10.3 1.80 Foods Heinz 532.8 -4.1 11.4 240.1 -5.0 2.22 Frozen Foods Bellisio 265.5 1.8 5.7 262.4 2.2
1.01 Foods Pinnacle 206.1 -0.2 4.4 75.1 -0.4 2.74 Foods Group Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT
Stouffer's \$536.0 -2.7% 11.5% 197.7 -4.4% \$2.71 Weight 415.3 1.3 8.9 194.7 0.3 2.13 Watchers Smart Ones Banquet 360.6 -11.8 7.7 352.3 -16.4 1.02 Marie 327.2 6.1 7.0 124.0 8.1 2.64 Callender's Stouffer's 266.4 55.9 5.7 123.4 66.0 2.16 In Csne Smpl Fvriltes Stopfer's In 255.2 1,044.2 5.5 96.5 854.3 2.64 Csne Clnary Cllctn Healthy 171.4 -1.8 3.7 77.7 -2.0 2.20 Choice Hungry Man 129.3 -16.0 2.7 46.1 -13.7 2.66 Healthy 106.9 -37.6

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2.3 40.1 -36.7 2.66 Choice Cafe Steamers Healthy 105.6 -15.1 2.2 41.8 -12.9 2.53 Choice Cmplt Slctions Category 4,637.1 -2.2 2,188.8 -4.8 2.12 total Source: SymphonyIRI Croup

Frozen Dinners/Entrees (Multi-serve)

It seems as if parents are looking away from the frozen case to feed the family. The category is down 6.2% in dollars and 9.2% in units. Top brand Stouffer's (32.1% market share) held its own, remaining relatively flat.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. VENDORS (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT Nestle \$840.3 -3.4% 39.6% 119.2 -6.3% \$7.05 USA Unilever 336.5 -15.2 15.8 47.6 -14.0 7.07 Bestfoods Nrth Amrica Bird's Eye 224.7 -0.4 10.6 51.1 -5.1 4.39 Foods Con Agra 156.2 5.1 7.3 36.0 -13.5 4.30 Foods Private 127.4 -5.1 6.0 18.2 -10.7 6.98 label Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGEVS AVG. (MILLIONS) VS YEAR (MILLONS) YEAR AGO PRICE AGO PER UNIT Stouffer's \$661.5 0.3% 32.1% 88.9 -3.0% \$7,80 Bird's Eye 224.4 -0.3 10.6 51.1 -5.0 4.39 Voila Bertolli 180.9 -9.9 8.5 26.6 -7.5 6.78 P F Chang's 128.3 -8.0 6.0 16.5 -7.0 7.76 Home Menu Private 127.4 -5.1 6.0 18.2 -10.7 6.98 label Marie 87.9 14.8 4.1 14.0 -6.9 5.89 Callender's Stouffer's 67.3 -7.1 3.1 18.2 -6.4 4.14 Easy Express Skillets Michael 63.8 13.8 3.0 7.2 6.3 8.80 Angelo's Banquet 58.2 -5.6 2.7 20.0 -18.8 2.91 Gourmet 51.2 53.6 3.4 11.1 72.6 4.81 Dining Category 2,118.1 -6.2 351.7 -9.2 6.02 total Source: SymphonyIRI Croup

Baby Formula (Ready-to-Drink)

Though the category struggled (-6.4% in dollars, -18.9% in units) some brands enjoyed solid gains. Gerber Good Start Gentle dollars were 437%, primarily because of its \$10.10 price point, more than \$2.00 above category average.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Abbott \$158.6 -8.2% 60.9% 19.3 -22.6% \$8.21 Nutrition Mead 85.1 -10.0 32.6 12.7 -16.1 6.69 Johnson Nutrition Gerber 15.8 63.6 6.1 1.6 16.4 9.68 Products Co. Private 1.0 -274 0.4 0.2 -28.6 6.40 label Nestle .069 10.7 0.0 .013 2.5 5.11 Healthcare Nutrition Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Similac \$73.8 -1.3% 28.3% 8.6 -11.4% \$8.55 Advance Enfamil 64.6 -5.9 24.8 10.1 -13.4 6.41 Premium Similac 36.1 13.0 14.6 5.2 1.6 7.39 Sensitive Similac 17.9 8.9 6 9 1.9 3.2 9.49 Expert Care Alimentum Gerber 13.9 437.1 5.3 1.4 242.4 10.10 Good Start Gentle Similac 10.9 59.0 4.2 1.6 47.8 6.67 isomil Enfamil 10.2 53.6 3.9 1.2 37.9 8.23 Gent lease Similac 6.0 -71.6 2.3 .92 -79.7 6.54 Sensitive R S Similac 4.9 70.0 1.9 .30 320.1 16.30 Similac 4.9 3.6 1.9 .62 -0.6 7.84 Neosure Advance Category 260.6 -6.4 33.8 -18.9 7.70 Total Source: SymphonyIRI Croup

Baby Formula (Powder)

Abbott Nutrntion overtook Mead Johnson at the top of the manufacturer list with a 9.8% boost in sales of its Similac products. The category's biggest gainer was Gerber Good Start Gentile, up almost 85%. Overall, dollars were up 4.7%.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Abbott \$1,349.9 9.8% 37.9% 747 2.3% \$18.07 Nutrition Mead 1,327.5 -1.1 37.3 68.0 -6.8 19.51 Johnson Nutrition Gerber 665.3 7.4 18.7 41.5 0.4 16.04 Products Co. Private 201.5 2.5 57 12.4 -3.5 16.21 label The Hain 7.3 38.5 0.2 0.3 367 29.01 Celestial Group Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Enfamil \$603.6 4.8% 17.0% 33.3 -0.8% \$18.14 Premium Similac 505.6 6.4 14.2 31.4 2.6 16.09 Advance Gerber Good 438.2 84.9 12.3 27.9 80.0 15.69 Start Gontle Similac 418.2 25.0 11.7 23.6 18.2 17.73 Sensitive Enfamil 271.9 9.4 7.8 13.6 3.0 20.03 Gent lease Private 201.5 2.5 5.7 12.4 -3.5 16.21 label Sirmi,

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146.7 10.8 4.1 6.2 3.3 23.76 Advance Early Shield Enfamil 114.9 14.4 3.2 4.4 6.8 25.97 Nutramigen Lipil Enfamil 109.4 -17.6 3.1 4.8 -19.6 22.64 Premium Enfamil 96.7 12.8 27 5.1 7.5 18.69 Prosobee Category 3,560.1 4.7 197.2 -1.6 18.05 Total Source: SymphonyIRI Croup

Convenience/PET Still Water

Nestle Waters NA stable of brands (Nestle-Pure Life, Poland Spring, Deer Park and Ozarka) earned it the top vendor spot with 33.2% of dollars. Private label was the biggest individual brand at 23.2%, up 17%. versus last year.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Nestle \$2,168.4 1.5% 33.2% 620.8 0.8% \$3,49 Waters North America Private 7,519.7 17.0 23.2 563.3 15.1 2.75 label Glaceau 698.0 -1.3 10.7 469.3 87 1.43 Water Co. Coca 564.6 9.7 8.6 208.5 8.0 2.71 Cola Co. Pepsico 552.2 17 8.4 193.0 -0.5 2.86 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$1,519.7 17.0% 23.2% 553.3 15.1% \$2.75 label Nestle 748.8 -1.2 11.5 199.0 -3.0 3.76 Pure Life Dasani 558.8 9.6 8.5 206.1 7.7 2.71 Aquafina 534.4 3.5 8.2 186.8 1.3 2 86 Poland 407.7 1,7 6.2 124.6 -2.6 3.27 Spring Glaceau 311.8 11.5 4.8 243.4 -15.7 1.28 Vitamin Water Deer 246.8 0.5 3.8 64.1 -0.2 3.85 Park Ozarka 207.3 -0.3 3.2 56.4 -1.2 3.68 Glaceau 194.3 14.2 3.0 103.4 7.7 1.88 Smart Water Glaceau 191.9 4.0 29 142.6 5.8 1.35 Vitamin Water Zero Category 6,538.5 4.3 2,580.3 0.4 2.53 Total Source: SymphonyIRI Croup

Licorice Box/Bag

Top brand Twizzlers was up 3.0% in dollars, though down 3.2% in units. However, Twizzlers Pull n' Peel more than picked up the slack, up 17.0% in dollars and 11.1% in units. Category dollars were up 2.7%. Units were down 1.7%.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT The \$278.4 4.0% 74.6% 144.2 1.5% \$1.93 Herehey Co. American 51.9 -6.1 13.9 25.5 -8.1 2.04 Licorice Co. Foreign 7.6 15.6 2.1 5.7 16.0 1.36 Candy Co. Private 7.6 -21.0 2.0 4.8 -22.6 1.60 label Danell Lea 6.7 37.5 1.8 2.5 43.9 2.72 Chocolate Shops Ply Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Twizzlers \$205.1 3.0% 55.0% 100.6 -3.2% \$2.04 Red Vines 475 -6.4 12.7 23.0 9.0 2.07 Twizzlers 34.8 17.0 9.3 16.4 11.1 2.12 Pull n' Peel Good & 22.9 -0.9 6.2 19.2 -0.2 1.19 Plenty Twizzlers 6.9 -0.4 2.4 4.3 8.3 2.07 Cherry Kick Private 7.6 -21.0 2.0 4.3 -22.6 1.60 label Rips 7.1 14.9 1.9 4.9 15.3 1.44 Darrell 6.7 37.5 1.8 2.5 43.9 2.72 Lea Darrell 6.6 11.0 1.8 3.6 4.7 1.82 Lea Nibs Lucky 3.6 17.9 1.0 1.4 25.6 2.59 Country Category 373 2.7 193.1 -1.7 1.93 Total Source: SymphonyIRI Croup

Non-Chocolate Chewy Candy

Sour has never been sweeter. Sour Patch Kids was the category's biggest gainer, up 16.6% in dollars and 18.8% in units. Skittles and Starburst were the top national brands, with 8.3% and 6.9% market share respectively. Store brands topped the category with 12.1% market share, up 6.5%.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Mars \$385.1 3.1% 22.6% 195.4 -2.1% \$1.97 Private 205.5 6.5 12.1 163.7 4.0 1.26 label Kraft 1677 11.2 11.0 100.6 137 1.67 Foods The 127.6 0.2 7.6 90.7 -37 1.41 Hershey Co. Parley's 99.7 -11.6 5.9 66.8 -12.3 1.45 & Salers Candy Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Private \$205.5 6.5% 12.1% 163.7 4.9% \$1.26 label Skittles 140.8 6.3 8.3 76.3 0.2 1.85 Star 117.1 -4.0 5.9 61.6 -8.9 1.90 burst Sour Patch 73.6 16.6 4.3 41.9 18.8 1.75 Kids Reese's 66.1 -3.7 3.9 46.6 -0.9 1.42 Pieces Swedish 58.1 4.1 3.4 26.9 3.1 2.01 Fish Life 51.2 -15.0 3.0 29.3 -23.5 1.75 Savers Gummies Skittles 51.1 137 3.0

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7,746 6 6.61 and Starburst Tootsie 49.0 -2.6 2.8 20.6 -10.6 2.33 Roll Haribo 44.8 16.1 2.6 30.1 84 1.49 Gold Bears Category 1,701.3 2.8 1,100.7 -0.7 1.55 Total Source: SymphonyIRI Croup

Sugar-Free Diet Candy

More consumers may be watching their sugar intake, but they are not turning to sugar-free candy. The category was down almost 5% in dollars and more than 9% in units. Overall the category generated \$110 million.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Storck \$32.7 5.8% 29.7% 15.5 3.5% \$2.11 USA Wm 22.4 -7.4 20.4 12.5 8.1 1.79 Wrigley Jr. Co, The 10.1 4.6 0.1 4.9 5.2 2.05 Hershey Co. Farley's 8.1 17.8 74 4.3 6.8 1.87 A Sathers Candy Co. Private 7.8 11.4 7.1 6.0 -4.6 1.30 label Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVE VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Werther's \$32.7 5.8% 29.7% 15.5 3.5% \$2.11 Original Life Savers 22.4 -7.1 20.4 12.6 -7.7 1.79 Private 7.8 11.4 7.1 6.0 -4.6 1.30 label Brach'e 4.8 37.1 4.4 2.4 29.0 1.96 Ice 4.1 -6.2 3.7 2.2 -3.2 1.91 Breakers Jolly 4.0 24.6 3.6 1.8 22.4 2.16 Rancher Russell 3.6 53.2 3.3 1.8 68.4 1.99 Stover Too Tarts 3.4 -11.3 3.1 2.2 -23.1 1.56 SmartChoice Halls 3.2 -67.4 2.9 1.9 64.2 1.68 Refresh Nips 3.2 -16.3 2.9 1.6 -19.3 1.80 Category 110.1 -4.7 60.8 -9.3 1.81 Total Source: SymphonyIRI Croup

Chocolate Candy Box/ Bag/Bar > 3.5 ounces

With sales up 6.3% versus last year, Hershey's remains the top vendor with more than 40% of dollars. However, the top brand was Mars' M&M's, with 15% market share.

TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT The Hershey \$1,663.5 6.3% 40.2% 628.7 0.9% \$2.65 Co. Mm 1,175.4 6.9 28.4 256.9 6.0 4.57 Nestle USA 306.9 8.9 7.4 152.3 -4.0 2.02 Lindt & 211.6 6.9 5.1 66.3 2.6 3.20 Sprungli A.G. Ghirardelli 149.2 20.4 3.6 46.1 19.9 3.24 Chocolate Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC BRANDS (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT M & M's \$620.1 5.7% 15.0% 138.7 2.2% \$4.47 Hershey's 293.2 2.8 7.1 107.4 -4.6 2.73 Reese's 231.2 -0.6 5.6 55.2 -6.1 4.19 All 174.3 12.8 4.2 24.9 -0.1 7.01 Hershey's products Hershey's 170.8 8.5 4.1 41.6 2.9 4.11 Kisses Dove 136.2 7.6 3.3 37.4 6.8 3.64 Promises Snickers 133.4 4.7 3.2 19.8 8.4 6.72 AIL Mars4 122.0 6.7 2.9 16.0 9.5 7.64 products Hershey's 116.9 8.7 2.8 28.0 6.5 4.18 Nuggets Lindt 113.1 0.7 2.7 30.3 -5.1 3.73 Lindor Category 4,142.5 7.0 1,395.0 1.3 2.97 total Source: SymphonyIRI Group

Chocolate Candy Snack Size

Snickers (13.4%) gave up the top spots to Reese's (13.7%), with Kit Kat (11.1%) a close third. The category suffered with units, down 9.0%, though dollars were only down 1.8%.

TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT The Hershey \$643.7 -3.7% 50.0% 307.9 10.9% \$2.11 Co. Mars 537.8 1.5 41.4 237.7 B.5 2.26 Nestle USA 105.2 8.6 8.1 36.2 3.4 2.91 Tootsie Roll 2.6 35.0 0.2 1.0 24.0 2.61 Industries Just Born 1.4 43.2 0.1 0.5 35.1 2.96 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT Reese's \$1779 -4.3% 13.7% 98.8 -14.6% \$1,80 Snickers 173.9 -6.9 13.4 81.1 -15.3 2.15 Kit Kat 144.3 4.7 11.1 74.7 -8.2 1.93 All 96.0 -30.0 7.4 10.5 -38.2 9.11 Hershey's products Hershey's 93.1 15.6 7.2 47.3 -3.3 1.97 All Mars' 85.3 2.9 6.6 10.0 1.0 8.54 products M&M's 79.3 6.9 6.1 39.9 0.6 1.99 Milky Way 77.8 114 6.0 43.9 11.0 1.77 Peter Paul 59.1 -27 4.5 33.6 -15.4 1.78 Almond Joy Twix 58.1 -77 4.5 33.0 -16.1 1.76 Category 1,298.3 -1.8 584.3 -9.0 2.22 total Source: SymphonyIRI Group

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Hard Sugar Candy/ Pkg & Roll Candy

Hard sugar was on a roll last year. Dollars were up 14.3% and units up 17.0%. Top brand Werther's outpaced the category, up more than 22%. Overall, eight of the top ten brands were up for the year.

TOP VENDORS \$ SALES CHANGE SHARE UNIT SALES CHANGE (MILLIONS) VS. I (MILLIONS) VS. I TEAR TEAR AGO AGO The Hershey \$104.4 39.4% 20.4% 49.7 55.9% \$2.10 Co. Storck USA 80.8 22.4 15.8 39.8 16.5 2,03 Tootsie Roll 55.8 3.1 10.9 24.6 0.0 2.27 Industries Spangler 49.6 715 9.7 13.7 3.8 3.62 Candy Co. Charms 40.6 -3.0 7.9 31.0 -7.7 1.31 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR AGO PER AGO UNIT Werther's \$80.8 224% 15.8% 39.8 16.5% \$2,03 Original Jolly 790 6.7 15.5 32.0 2.7 2.46 Rancher Spangler 38,2 6.6 7.5 9.7 5.0 3.93 Dum Dum Pops Private 37.9 16.8 7.4 33.6 12.9 1.13 label Charms Blow 35.6 -3.8 7.0 24.3 -9.6 1.46 Pop Tootsie 30.1 -6.9 5.9 13.3 -9.1 2.26 Roll Pops Life 287 2.1 5.6 14.4 -5.0 2.00 Severs Jolly 25.4 2,947.3 5.0 17.6 2,599.1 1.44 Rancher Crunch 'N Chew Nips 22.1 18.2 4.3 21.2 17.4 1.04 Original 20.8 88.4 4.1 42.2 89.0 0.49 Gourmet Category 510.5 14.3 331.0 17.0 1.54 total Source: SymphonyIRI Group

Granola Bars

General Mills and Quaker Oats are the top vendors, capturing 38.5% and 25.9% of market share respectively. Quaker did close the gap, up 6.9% in dollars and 10.6% in units while General Mills was down 4.4% in dollars and 9.9% in units.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC VENDORS (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT General \$636,0 -4.4% 38.5% 177.5 -0.9% \$3.56 Mills Quaker 428.1 6.9 25.9 157.7 10.6 2.71 Oats Co. Private 173.0 13.6 10.5 76.7 10.7 2.26 label Kashi 105.2 12.2 6.4 32.2 12.2 3.27 Co. Kellogg 96.1 -11.7 5.9 31.8 -9.2 3.09 Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC BRANDS (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT Nature \$386.5 -0.2% 23.4% 107.3 -7.0% \$3.60 Valley Quaker 230.1 -5.7 13.9 79.4 -7.0 2.90 Chewy Nature 179.3 -1.2 10.9 51.8 -8.1 3.46 Valley Sweet & Salty Nut Private 173.0 13.8 10.5 76.7 10.7 2.26 label Quaker 115.4 28.2 7.0 42.0 324 275 Chewy Dipps Kashi 95.1 1.5 5.8 29.3 2.3 3.24 TLC Kelloggs 70.6 -34.3 4.3 21.9 -35.0 3.22 Fiber Plus Nature 57.4 -28.5 3.5 14.2 34.5 4.05 Valley Chewy Trail Mix Quaker 43.9 -25.4 27 17.1 -13.3 2.57 Chewy 90 Cat Sunbelt 43.4 -48.9 2.6 21.3 -50.9 2.04 Category 1,651.9 1.2 556.3 -0.4 2.97 total Source: SymphonyIRI Group

Salad Dressing Mixes

HV Foods and its Hidden Valley Ranch brand control more than half of the category. The only other significant player is Kraft and its Good Seasons brand. Private label grew by almost 19% but still only accounted for 4.2% of market share.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC VENDORS (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT HV Food \$73.5 6.8% 54.9% 31.3 4.5% \$2.35 Products Co. Kraft 53.0 -0.5 39.6 21.1 -0.4 2.51 Foods Private 5.6 18.9 4.2 4.5 30.1 1.25 label Uncle 1.4 3.4 1.0 .58 2.0 2.39 Dan's Unilever 0.3 10.6 0.1 .07 13.6 2.85 Bestfoods North America Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT Hidden \$73.5 6.8% 54.9% 31.3 4.5% \$2.35 Valley Ranch Good 63.0 -0.5 39.6 21.1 -0.4 2.51 Seasons Private 5.6 18.9 4.2 4.5 30.1 1.25 label Uncle Dan's 1.4 3.4 1.0 .58 2.0 2.39 Knorr .19 1.14 0.1 .08 14.2 2.85 J & D's .10 9.2 0.1 .06 11.2 1.74 Simply .07 2.6 0.1 .06 2.2 1.52 Organic Naturally .06 22.4 0.1 .07 18 0 0.77 Fresh Braswell's .03 0.4 0.1 .02 14.6 1.67 The Chef in .02 -17.6 0.1 .01 -3.8 2.33 Black Category 134.0 4.2 57.8 4.1 2.32 total Source: SymphonyIRI Group

Shelf Stable Pourable Salad Dressings

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Stroe brands continue to gain market share, up 8.8% in dollars. Kraft still held the top brand, but was down 6.2%. Category sales nearly reached \$2 billion, up 3.3%. Units were relatively flat.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC VENDORS (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT HV Food \$437.3 6.7% 22.1% 112.1 2.4% \$3.90 Products Co. Kraft 405.0 -6.7 20.5 181.3 5.8 3.23 Foods Private 320.1 8.8 18.2 170.1 3.3 1.88 label Unilever 256.3 1.0 13.0 115.6 -1.2 2.22 Bestfoods Nrh America Ken's 205.4 5.2 10.4 94.2 4.9 2.18 foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVC BRANDS (MILLIONS) VS. I (MILLIONS) VS. I PRICE TEAR TEAR PER AGO AGO UNIT Kraft \$346.7 -6.2% 17.6% 154.B -67% \$2.24 Private 320.1 8.8 16.2 170.1 3.3 1.88 label Wishbone 231.5 2.1 11.7 104.5 0.3 2.22 Ken's 187.7 3.6 9.5 84.4 2.8 2.22 Steak House Newman's 57.4 9.0 2.9 16.5 67 3.49 Own Newman's 38.8 -9.2 2.0 10.9 -11.1 3.57 Own Lighten Up Brianna's 29.8 3.7 1.6 8.1 3.3 3.66 Girard's 20.4 -1.6 1.0 5.2 -0.9 3.97 Kraft 20.3 -7.6 1.0 9.1 -7.7 2.24 Free Category 1,978.3 3.3 793.6 0.3 2.49 total Source: SymphonyIRI Group

Cheese Snacks

Cheese snack sales were off last year, down 4.6% in dollars and 8.7% in units. The Cheetos brand owned the category with nearly 75% of market share. Utz and store brands each captured 4.1% of category sales, both down for the year.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Frito-Lay \$885.4 -4.9% 79.5% 458.9 -9.8% \$1.93 Utz Quality 46.6 -4.3 4.2 15.2 -4.9 3.06 Foods Private 45.9 -13.3 4.1 25.6 -15.4 1.79 label Wise Foods 27.7 13.2 2.5 17.6 21.4 1.57 Herr Foods 12.2 41.1 1.1 7.7 37.6 1.59 Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Cheetos \$832.1 0.5% 74.7% 443.4 -5.5% \$1.88 Private 45.9 -13.3 4.4 25.6 -15.4 1.79 label Utz 45.3 -6.9 4.1 15.0 -6.3 3.02 Baked 28.6 -11.6 2.6 8.3 -12.8 3.46 Cheetos Wise 26.6 9.8 2.4 17.1 18.7 1.56 Cheez Doodles Cheetos 13.2 -39.8 1.2 3.7 -38.0 3.54 Natural Herr's 12.2 41.2 1.1 7.7 37.5 1.59 Golden 10.8 22.8 1.0 8.2 25.0 1.32 Flake Cheetos 7.8 N/A 0.7 2.3 N/A 3.46 Simply Natural Robert's 7.5 10.6 0.7 2.3 3.4 3.25 American Gourmt Smer Pffs Category 1,114.4 -4.6 576.3 -8.7 1.93 total Source: SymphonyIRI Group

Potato Chips

Four of the top six brands belong to Frito-Lay, which controls nearly 60% of the potato chip category. However, Procter & Gamble's Pringles was the biggest gainer with dollars up 13.8%. Overall sales surpassed \$5 billion, up 3.5% versus last year.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Frito-Lay \$3,137.1 2.2% 58.9% 1,281.5 -1.3% \$2.45 Procter & 593.4 10.7 11.14 350.7 12.3 1.69 Gamble Private 420.3 6.9 7.9 211.7 3.9 1.99 lable Utz Quality 205.9 5.7 3.9 110.1 4.4 1.87 Foods Cape Cod 147.0 11.5 2.8 48.1 7.7 3.06 Potato Chip Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Lays \$1,521.4 3.8% 28.6% 656.6 -0.9% \$2.32 Ruffles 506.3 1.0 9.5 192.1 -3.8 2.64 Pringles 447.9 13.8 8.4 301.5 14.7 1.49 Wavy Lays 423.0 2.9 7.9 153.5 -1.1 2.76 Private 420.3 6.9 7.9 211.7 3.9 1.99 label Lays Kettle 262.9 10.2 4.9 96.0 9.8 2.74 Cooked Utz 170.2 3.1 3.2 95.8 2.6 1.78 Cape Cod 147.0 11.5 2.8 48.1 7.7 3.06 Kettle 145.3 -0.2 2.7 54.6 -0.5 2.66 Baked 101.8 -16.2 1.9 31.1 -16.0 3.27 Lays Category 5,325.0 3.5 2,380.5 1.4 2.24 total Source: SymphonyIRI Group

Tortilla/Tostada Chips

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Consumer favorite Doritos nearly doubled runner-up Tostitos (34.2% to 17.3%). Tostitos Scoops was a top gainer, up 10.6% in dollars. Overall the category generated \$3.5 billion in dollars, up 4.6%. Units sales were relatively flat, up 0.7%.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Frito-Lay \$2,595.7 2.3% 73.7% 966.5 -2.0% \$2.69 Private 189.6 8.0 5.4 103.4 3.5 1.83 label Mission 123.1 0.8 3.5 44.7 -0.8 2.75 Foods Truco 113.4 55.7 3.2 37.6 56.7 3.02 Enterprises Bimbo 75.7 44.2 2.1 37.7 30.5 2.01 Bakeries USA Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Doritos \$1,204.1 -1.0% 34.2% 492.0 -8.2% \$2.45 Tostitos 610.8 -3.8 17.3 189.1 -4.2 3.23 Tostitos 393.4 10.6 11.2 117.6 11.2 3.34 Scoops Santitas 230.7 -1.4 6.5 112.6 -3.1 2.05 Private 189.6 8.0 5.4 103.4 3.5 1.83 label Mission 121.0 0.7 3.4 44.3 -0.8 2.73 On The 112.9 60.0 3.2 37.2 63.4 3.03 Border Batcel Takis 62.1 52.1 1.8 31.0 33.8 2.00 Fuego Doritos 51.1 4,337, 1.5 19.7 1,826, 5.29 Jacked 848, 844, 234.5 803.3 Calidad 35.3 -2.1 1.0 22.0 -2.9 1.60 Category 3,523.4 4.6 1,353.9 0.7 2.60 total Source: SymphonyIRI Group

Noodles

With more than 26.0% of market share, private label topped the noodles category. The entire category was flat (-0.7%) in dollars, yet units were down 4.5%. Average price per unit was under \$2.00, though up 5-cents versus last year.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Private \$62.8 1.5% 26.9% 38.4 -0.9% \$1.63 label New World 40.9 3.0 17.5 20.7 -3.2 1.98 Pasta Strom 40.4 -5.0 17.3 19.7 -12.8 2.05 Products American 25.4 -11.5 10.9 13.6 -11.1 1.87 Italian Pasta Co. Dutch 6.8 -5.4 2.9 2.2 -7.2 3.06 Corp Total U.S. sales through supermarkets drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Private \$62.8 1.5% 26.9% 38.4 -0.9% \$1.63 label No Yolks 40.4 -5.0 17.3 19.7 -12.8 2.05 Light 'N 15.9 1.9 6.8 8.4 -6.7 1.90 Fluffy Pennsylvania 13.0 -3.7 5.6 7.4 -0.4 1.77 Dutch Creamette 7.3 7.1 3.1 3.5 4.4 2.09 Mueller's 7.3 -25.4 3.1 3.8 -26.6 1.89 Das 6.8 -5.4 2.9 2.2 -7.2 3.06 Dutchman Essenhaus Inn Maid 5.8 -10.0 2.5 3.4 -14.1 1.73 Manischewitz 5.6 7.1 2.4 2.9 14.2 1.96 American 5.0 -3.3 2.1 2.3 -10.9 2.19 Beauty Category 233.3 -0.7 120.7 -4.5 1.93 total Source: SymphonyIRI Group

Spaghetti/Macaroni/Pasta (No Noodles)

Pasta continues to be a family favorite as dollars reached nearly \$2 billion. Store brands, up 0.8%, accounted for 29.0% of market share while number two Barilla inched closer to the top, up 4.0%.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Private \$561.2 0.8% 29.0% 425.0 0.1% \$1.32 label Barilla 541.7 0.9 28.0 384.7 1.6 1.41 America New World 380.0 -3.9 19.7 283.1 -5.6 1.35 Pasta American 159.0 5.6 8.2 117.0 3.5 1.36 Italian Pasta Co. Molino E 33.2 -6.4 1.7 14.0 -9.6 2.37 Pastificio De Cecco pescara Total U.S. sales through supermarkets drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Private \$561.2 0.8% 29.0% 425.0 0.1% \$1.32 label Barilla 471.7 4.0 24.4 348.8 4.6 1.35 Ronzoni 97.3 -1.0 5.0 80.0 -4.2 1.22 Mueller's 89.4 8.0 4.6 70.6 5.8 1.27 Creamette 67.8 2.8 3.5 47.2 2.1 1.44 Barilla 57.9 -6.5 3.0 26.5 -8.7 2.18 Plus San Giorgio 44.2 6.4 2.3 34.6 -8.8 1.28 American 38.9 -4.6 2.0 25.1 -2.9 1.55 Beauty Skinner 38.2 9.7 2.0 27.1 14.6 1.41 De Cecco 33.2 -6.4 1.7 14.0 -9.6 2.37 Category 1,932.6 0.8 1,435.0 0.0 1.35 total Source: SymphonyIRI Group

Spaghetti/Italian Sauce

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

Though Campbell Soup's Prego was the top brand, Unilever garnered the top vendor spot, led by its Ragu and Bertolli brands. Other than Prego (up 5.0%), the only other brand to show significant gains was Francesco Rinaldi, up 4.0%.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Unilever \$756.3 -3.4% 34.5% 352.8 -2.0% \$2.14 Bestfoods Nrh American Campbell 386.9 2.8 17.6 156.9 2.3 2.47 Soup Co. H J Heinz 245.4 -4.2 11.2 96.3 -4.6 2.55 Co. Private 195.5 0.6 8.9 118.2 0.1 1.65 label Conagra 125.4 -12.3 5.7 119.8 -11.0 1.05 Foods Total U.S. sales through supermarkets drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG PRICE (MILLIONS) VS. (MILLIONS) VS. PER UNIT YEAR YEAR AGO AGO Prego \$352.6 5.0% 16.1% 142.2 4.8% \$2.48 Ragu 260.7 -2.6 11.9 131.0 -0.6 1.99 Ragu Old 245.6 -4.9 11.2 105.9 -3.7 2.32 World Style Private 195.5 0.6 8.9 118.2 0.1 1.65 label Bertolli 154.6 0.0 7.0 65.0 0.8 2.38 Classico 144.7 -5.4 6.6 58.8 -6.0 2.46 Signature Recipes Hunts 124.6 -12.4 5.7 119.3 -11.0 1.04 Classico 96.6 -3.6 4.4 36.2 -3.9 2.67 Traditional Favorites Ragu 73.3 -7.3 3.3 41.4 -5.4 1.77 Robusto Francesco 68.0 4.0 3.1 45.2 -1.2 1.51 Rinaldi Category 2,194.2 -0.7 1,039.2 -1.63 2.11 total Source: SymphonyIRI Group

Refrigerated Breakfast Sausage/Ham

The category did well last year, up 2.4% in dollars and 3.4% in units. Hillshire and its Jimmy Dean brand paced the category with almost 34% market share. Johnsonville also did well, up almost 10%.

TOP VENDORS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Hillshire \$485.8 2.7% 34.4% 143.0 1.1% \$3.40 Brands Johnsonville 141.8 9.9 10.0 44.2 11.7 3.21 Sausage Bob Evans 126.5 -8.9 9.0 37.9 -1.2 3.33 Farms Private 123.6 5.2 8.8 45.1 5.6 2.74 label Odom's 87.2 1.1 6.2 25.8 6.7 3.39 Tennessee Pride Ssge Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHAGE AVG (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Jimmy Dean \$476.9 2.7% 33.8% 141.3% 1.1 \$3.38 Johnsonville 141.8 9.9 10.0 44.2 11.7 3.21 Bob Evans 123.8 -6.5 8.8 37.0 2.5 3.35 Private 123.6 5.2 8.8 45.1 5.6 2.74 label Tennessee 87.0 2.3 6.2 25.7 7.9 3.38 Pride Swaggerty 30.8 29.7 2.2 5.6 35.9 5.48 Owen's 27.8 8.2 2.0 8.0 18.6 3.47 Eckrich 26.9 38.4 1.9 10.4 38.6 2.58 Smok-y Jennie-O 20.6 -3.1 1.5 5.3 -5.4 3.92 Turkey Store Farmland 18.5 2.0 1.3 10.0 6.1 1.85 Category 1,411.7 2.4 440.7 3.4 2.20 total Source: SymphonyIRI Group

Frozen Breakfast (handheld)

The category was up nearly 10%, led primarily by Hillshire Brands Jimmy Dean products. Overall, Hillshire accounted for more than 55% of dollars, up 7.9%. Store brands also did well, increasing by more than 13% in dollars and a whopping 48.1% in units.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Hillshire \$487.2 7.9% 55.9% 73.8 0.9% \$6.60 Brands Odom's 91.7 2.8 10.5 17.8 3.3 5.13 Tennessee Pride Sausage Private 57.3 13.3 6.5 14.7 48.1 3.89 label Heinz 48.2 20.0 5.5 16.6 18.2 2.89 Frozen Foods Nestle 46.2 5.0 5.3 21.6 12.0 2.14 USA Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27, TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Jimmy \$386.1 7.0% 44.3% 58.3 0.1% \$6.61 Dean Odom's 64.5 14.3 7.4 12.0 16.9 5.37 Tennessee Pride Jimmy Dean 64.2 2.055, 7.3 9.6 1.606, 6.67 Delights 204.9 964.1 Private 57.3 13.3 6.5 14.7 48.1 3.89 label Wght 35.1 -11.6 4.0 11.7` -15.6 2.99 Wtchrs Smrt Ones Mrnn Exp Hot 29.9 5.6 3.4 12.9 11.8 2.31 Pockets Jimmy Dean 27.7 -61.9 3.1 4.0 -62.9 6.79 Dlights Tennessee 27.2 -16.8 3.1 5.8 -16.5 4.64 Pride Kellogg's 21.6 N/A 2.4 3.9 N/A 5.52 Special K Pillsbury 16.7 6.5 1.9 6.4 4.5 2.57 Category 70.9 9.8 185.6 8.2 4.69 total Source: SymphonyIRI Group

Spice/Seasoning--No Salt/Pepper

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

The competition is closing in on category leader McCormick. Store brands were up 13.2% and ACM was up 8.9% versus only 1.9% for McCormick. Overall dollars were up 6% and units 2.8%.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT McCormick \$711.2 1.9% 37.1% 240.7 -2.2% \$2.95 & Co. Private 285.1 13.2 14.9 135.6 6.2 2.10 label ACH Food 160.0 8.9 8.4 43.7 4.7 3.66 Companies B & G 90.5 -2.9 4.7 29.3 -1.8 3.08 Foods Goya 71.8 6.8 3.7 34.8 5.8 2.06 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT McCormick's \$398.4 3.3% 20.8% 113.5 0.0% \$3.51 Private 285.1 13.2 14.9 135.6 6.2 2.10 label McCormick 122.4 -0.4 6.4 23.0 -6.6 5.32 Gourmet Collection McCormick 93.2 6.0 4.9 35.3 1.0 2.64 Grill Mates Tones 67.9 11.5 3.5 18.3 3.0 3.71 Mrs. Dash 62.1 -2.5 3.2 21.1 -1.0 2.94 Spice 55.5 6.9 2.9 10.7 9.4 5.16 Islands Badia 53.8 13.4 2.8 25.2 10.3 2.13 Spice World 52.1 -0.2 2.7 18.5 0.4 2.81 Sazon Goya 44.7 6.0 2.3 21.8 5.5 2.05 Category 1,916.4 6.0 724.5 2.8 2.65 total Source: SymphonyIRI Group

Condensed Wet Soup

Campbell's stands unchallenged. With eight of the top 10 brands, the soup giant controls more than 80% of the category. The only other significant player is private label, with almost 18% market share, down 1.2% versus last year.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS. (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Campbell \$1,324.9 0.6% 81.4% 1,010.0 -6.4% \$1.31 Soup Co. Private 291.4 -1.2 17.9 307.0 -5.1 0.95 label Snow's/ 2.2 -10.5 0.41 1.3 -9.7 1.63 Doxsee Pacific 2.0 41.5 0.1 0.8 30.2 2.66 Foods of Oregon Looks 1.8 26.4 0.1 0.5 32.8 3.76 Gourmet Food Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANE SHARE UNIT SALES CHANGE AVG (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Campbell's \$1,089.3 -0.5% 66.9% 847.9 -7.6% \$1.28 Private 291.4 -1.2 17.9 307.0 -5.1 0.95 label Campbell's 191.1 8.5 11.7 131.3 3.1 1.46 Healthy Request Campbell's 13.2 -14.4 0.8 9.1 -17.8 1.45 Light Campbell's 7.2 13.2 0.4 5.0 9.5 1.45 Disney Princess Campbell's 5.9 N/A 0.4 4.1 N/A 1.45 Disney Phineas & Ferb Campbell's 5.2 N/A 0.3 3.5 N/A 1.46 Scooby Doo Campbell's 4.2 1.5 0.3 2.9 -0.3 1.45 Batman Campbell's 3.7 -21.8 0.2 2.6 -24.3 1.41 Danny Phantom Snow's 2.2 -10.5 0.1 1.3 -9.7 1.63 Category 1,627.3 0.3 1,322.7 -6.0 1.23 total Source: SymphonyIRI Group

Dry Soup

The Lipton brand took two of the top three spots. Overall, the category was flat, with dollars around \$361 million and units around 217 million. Average price per unit was \$1.66, nearly 20 cents less than last year.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Unilever \$161.1 -1.4% 44.6% 110.0 0.3% \$1.47 Bestfoods Nrth America Bear Creek 59.6 -1.2 16.5 17.3 2.5 3.45 Country Kitchens Private 29.4 -0.5 8.1 25.3 -3.4 1.16 label Nongshim 19.7 7.6 5.5 14.9 7.3 1.32 H.J. Heinz 14.6 -5.9 1.0 7.3 -3.9 2.00 Co. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG (MILLIONS) VS. (MILLIOS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Lipton \$83.3 -1.6% 23.1% 52.8% -0.6% \$1.58 Recipe Secrets Bear Creek 59.6 -1.2 16.5 17.3 2.5 3.45 Country Kitchens Lipton Soup 40.6 1.2 11.2 27.6 1.8 1.47 Secrets Private 29.4 -0.5 8.1 25.3 -3.4 1.16 label Knorr 25.9 -0.5 7.2 21.8 4.9 1.19 Nongshim 19.6 7.2 5.4 14.9 7.2 1.32 Wylers Mrs. 14.6 -5.9 4.0 7.3 -3.9 2.00 Grass Hurst's 14.3 -0.6 4.0 5.4 -3.6 2.64 HamBeens Lipton 11.2 -10.6 3.1 7.8 -10.4 1.45 Cup-a-Soup Shore Lunch 5.3 4.3 1.5 1.5 7.8 3.63 Category 361.1 -0.1 217.7 0.9 1.66 total Source: SymphonyIRI Group

Ready-to-Serve Wet Soup

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

General Mills' Progresso captured top brand honors. However, Campbell's and its extensive product line led the way on the manufacturers side. Overall, category dollars were up nearly 3.0%, with sales of nearly \$1.9 billion. Units were up 1.6%.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Campbell \$835.9 -0.7% 44.5% 449.3 -1.2% \$1.86 Soup Co. General 749.0 7.8 39.9 427.7 6.8 1.75 Mills Private 76.2 -9.1 4.1 43.1 -13.9 1.77 label Conagra 75.6 -2.4 4.0 36.3 -6.9 2.09 Foods Amy's 40.0 20.1 2.1 14.6 16.8 2.74 Kitchen Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR AGO PER AGO UNIT Progresso \$722.5 9.5% 38.5% 412.8 8.4% \$1.75 Campbell's 402.0 0.2 21.4 218.6 1.4 1.84 Chunky Campbell's 144.3 5.3 7.7 80.4 5.7 1.79 Chunky Hlthy Reqst Campbell's 96.2 N/A 5.1 52.5 N/A 1.83 100% Natural Private 76.2 -9.1 4.1 43.1 -13.9 1.77 label Healthy 66.0 -10.8 3.5 33.7 -11.8 1.96 Choice Campbell's 50.4 7.9 2.7 27.1 3.4 1.86 Amy's 39.6 19.0 2.1 14.6 16.5 2.72 Campbell's 36.3 N/A 1.9 22.7 N/A 1.60 Go Campbell's 27.7 60.2 1.5 8.3 63.6 3.35 Slow Kettle Category 1,878.6 2.9 1,008.9 1.6 1.86 total Source: SymphonyIRI Group

Dog Biscuits/Treats/Beverages

A strong year by Milk-Bone (up 9.2%) catapulted the brand over private label (-2.9%) and into the top spot. The category as a whole did well with dollars just below \$2 billion, up 5%, and up almost 3% in units.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR AGO PER AGO UNIT Del \$757.2 11.5% 37.9% 219.1 9.3% \$3.46 Monte Foods Nestle 263.4 8.2 18.2 78.8 4.3 4.61 Purina Petcare Co. Waggin' 274.3 -8.6 13.7 41.0 -5.8 6.70 Train Private 211.3 -2.9 10.6 72.8 -5.8 2.90 label Mars 194.7 12.8 9.7 46.4 1.4 4.20 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR AGO PER AGO UNIT Milk-Bone \$216.6 8.2% 10.8% 55.0 7.1% \$3.93 Private 211.3 -2.9 10.6 72.8 -5.8 2.90 label Waggin' 184.9 -11.3 9.3 21.2 -3.6 8.71 Train Jerky Tenders Purina 169.2 0.6 8.5 29.5 -7.6 5.74 Beggin' Strips Pup 146.8 -4.3 7.4 26.6 -10.2 5.53 Peroni Milo's 109.8 69.5 5.5 18.2 48.5 6.03 Kitchen Pedigree 108.7 36.0 5.4 22.4 19.5 4.85 Dentastix Canine 90.5 38.7 4.5 62.7 44.9 1.44 Carry Outs Purina 57.4 8.7 2.9 13.1 -1.5 4.39 Busy Bone Milk-Bone 52.4 -9.6 2.6 11.2 -12.6 4.69 Flavor Snacks Category 1,997.4 5.0 510.4 2.9 3.91 total Source: SymphonyIRI Group

Dry Dog Food

Private label dollar share (18%) was more than double any national brand. However, Nestle Purina was far and away the top vendor with 45% market share. Overall category dollars topped \$5 billion, up almost 3%. Units were off slightly.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO YEAR PER AGO UNIT Nestle \$2,337.3 5.0% 45.0% 178.9 1.7% \$13.06 Purina Petoare Co. Private 932.6 -0.4 18.0 81.9 -7.5 11.38 label Mars 617.7 3.2 11.9 48.8 3.5 12.65 Procter 556.8 -1.2 10.7 32.2 -0.9 17.32 & Gamble Del 489.9 -1.4 9.4 52.9 -1.7 9.26 Monte Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGES SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. YEAR (MILLIONS) VS. PRICE AGO AGO PER UNIT Private \$932.6 -0.4% 18.0% 81.9 -7.5% \$11.38 label Pedigree 423.6 6.3 8.2 29.6 5.8 14.31 Purina One 283.6 55.9 5.5 15.5 42.6 18.26 Smartblend Purina Dog 264.2 -38.9 5.1 19.4 -36.7 13.61 Chw Hlthy Lif Nutritn Kibble 'n 262.6 -2.5 5.1 27.4 -2.4 9.57 Bits Purina 259.0 -1.4 5.0 19.9 -4.7 12.99 Beneful Purina Dog 253.7 200.2 4.9 14.0 234.5 18.09 Chow Purina 221.4 -2.6 4.3 16.0 -4.1 13.85 Beneful Healthy Weight Imas 156.0 5.2 3.0 8.0 11.9 19.49 Proactive Health Purina Alpo 110.6 13.7 2.1 11.7 5.8 9.47 Prime Cuts Category 5,189.9 2.9 420.5 -0.6 12.34 total Source: SymphonyIRI Group

Wet Dog Food

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

Category dollars were the same as last year while units were down slightly (-1.5%). Cesar Canine Cuisine (13.9%) and Pedigree (12.2%) were the top brands, followed closely by private label (11.1%). Mars was the top vendor at 47.6%.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS YEAR (MILLIONS) VS
YEAR PRICE AGO AGO PER UNIT Mars \$640.8 2.2% 47.6% 533.5 -0.1% \$1.20 Nestle 446.9 -3.2 33.2 341.3 -2.7
1.31 Purina Petcare Co. Private 150.1 -12.2 11.1 144.4 -18.8 1.04 label Del 48.6 29.9 3.6 67.3 49.4 0.72 Monte
Foods Procter 27.6 -7.3 2.1 14.8 -12.0 1.87 & Gamble Total U.S. sales through supermarkets, drugstores, mass
merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE
SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO
AGO UNIT Cesar \$187.1 -2.9% 13.9% 176.8 -10.7% \$1.06 Canine Cuisine Pedigree 164.3 6.4 12.2 145.2 5.7 1.13
Private 150.1 -12.2 11.1 144.4 -18.8 1.04 label Pedigree 127.1 2.5 9.4 89.0 0.9 1.43 Choice Cuts Purina 93.5 0.2
6.9 68.8 -0.6 1.36 Alpo Prime Cuts Purina 83.8 -7.9 6.2 45.3 -9.9 1.85 Beneful Prepared Meals Pedigree 77.7 -4.0
5.8 30.1 -11.9 2.58 Little Champions Purina 40.9 -9.4 3.0 32.3 -4.7 1.26 Alpo Prime Slices Purina 31.5 -4.7 2.3 27.5
1.2 1.15 Alpo Chop House Originals Purina 28.8 7.0 2.1 31.9 3.3 0.90 Alpo Chop House Category 1,346.8 0.0
1,121.8 -1.5 1.20 total Source: SymphonyIRI Group

Cat Snacks/Beverages

Cats love their snacks. The category was up 5.2% in dollars and almost 2% in units. Top vendors Mars (57.5%) and Nestle (34.8%) grabbed the lion's share of dollars and were up 6.7% and 7.2% respectively. Average price per unit was \$1.82.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG BRANDS (MILLIONS) VS YEAR (MILLIONS) VS
YEAR PRICE AGO AGO PER UNIT Mars \$216.5 6.7% 57.5% 111.8 3.2% \$1.94 Nestle 131.0 7.2 34.8 76.4 3.3
1.71 Purina Petcare Co. Del Monte 14.3 -15.6 3.8 10.7 -8.5 1.33 Foods Worldwise 5.2 -1.9 1.4 1.5 -10.5 3.42 Del
Monte 3.0 -15.9 0.8 3.0 -14.4 1.00 Pet Foods Total U.S. sales through supermarkets, drugstores, mass
merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES
CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO
AGO UNIT Whiskas \$149.9 1.7% 39.8% 74.0 -4.2% \$2.03 Temptations Friskies 75.6 14.5 20.1 41.3 8.8 1.83 Party
Mix Whiskas 28.6 86.2 7.6 16.1 72.6 1.77 Temptations Mixups Purina 16.4 -4.2 4.4 10.7 -4.4 1.54 Whisker Lckn's
Crnch Lvrs Purina 13.8 -5.7 3.7 11.3 -7.2 1.22 Whiskr Lckn's Tnder Mmnts Whiskas 8.6 -19.9 2.3 5.1 -11.9 1.70
Temptations Natural The Goodlife 7.4 -28.1 2.0 2.8 -31.0 2.60 Recipe Pounce 7.2 -6.3 1.9 6.7 4.3 1.08 Purina 6.9
16.5 1.8 2.4 16.6 2.83 Whisker Lickin's Friskies 6.9 48.6 1.8 4.6 49.8 1.50 Crispies Category 376.2 5.2 207.3 1.8
1.82 total Source: SymphonyIRI Group

Dry Cat Food

Nestle Purina was the runaway leader with 50.6% of dollar share, up 3.8%. Private label captured top spot on the brand side with 9.8% dollar share. Overall category dollars topped \$2.2 billion, while units were down 3.4%.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS.
PRICE YEAR YEAR PER AGO AGO UNIT Nestle \$1,135.7 3.8% 50.6% 163.3% -2.6% \$6.95 Purina Petcare Co.
Del 409.6 6.4 18.2 58.0 6.8 7.07 Monte Pet Foods Private 219.8 -14.2 9.8 38.4 -14.2 5.72 label Procter 213.1 -0.3
9.5 20.0 1.2 10.63 & Gamble Del 147.4 -1.3 6.6 23.2 -3.1 6.34 Monte Foods Total LI.S. sales through
supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan.
27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS. (MILLIONS) VS.
PRICE YEAR YEAR PER AGO AGO UNIT Private \$219.8 -14.2% 9.8% 38.4 -14.2% \$5.72 label Meow Mix 189.0 -
22.5 8.4 22.5 -35.2 8.41 Purina Kit 146.3 42.1 6.5 17.6 29.3 8.23 & Kaboodle Purina Cat 129.0 -28.0 5.7 13.9 -36.5
9.26 Chow Cmplte Formula Meow Mix 123.4 34.7 5.5 18.5 115.9 7.48 Original Choice Purina Cat 104.2 -29.7 4.6
12.4 -40.7 8.43 Chow Indoor Formula Friskies 94.8 4.7 4.2 13.0 -2.4 7.31 Seafood Sensations Iams 92.0 7.6 4.1 8.0
9.9 11.44 Proactive Health 9 Lives 80.7 -5.1 3.6 10.6 -5.0 7.68 Daily Essentials Friskies 70.6 22.9 3.1 10.2 8.9 6.95
Feline Favorites Category 2,245.7 0.4 325.7 -3.4 6.89 total Source: SymphonyIRI Group

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Wet Cat Food

Purina Fancy Feast (25.2%) and Friskies (23.2%) went neck and neck for the top brand spot. No other brand reached double-digits. Private label held the third spot with 6.6% market share. Overall, the category was up 4.6%.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS. (MILLIONS) VS. PRICE YEAR YEAR PER AGO AGO UNIT Nestle \$1,423.0 6.2% 73.4% 1,629.3 0.0% \$0.87 Purina Petcare Co. Del 151.5 -2.7 7.9 132.5 -1.6 1.14 Monte Foods Private 126.6 -5.5 6.6 186.0 -8.0 0.68 label Del 97.2 20.6 5.1 75.6 18.1 1.28 Monte Pet Foods Mars 91.5 6.3 4.8 63.7 -6.3 1.44 Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AVG (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Purina \$483.4 0.1% 25.2% 560.2 -4.4% \$0.86 Fancy Feast Friskies 444.9 0.5 23.2 519.1 -4.9 0.86 Private 126.6 -5.5 6.6 186.0 -8.0 0.68 label 9 Lives 111.6 5.5 5.8 90.4 0.1 1.23 Friskies 99.5 4.4 5.2 123.1 -9.6 0.81 Prime Filets Purina 95.3 -1.3 5.0 69.9 -6.8 1.36 Fancy Feast Elgant Mdlys Meow Mix 80.9 0.8 4.2 59.7 -6.3 1.35 Market Select Friskies 67.7 63.4 3.5 100.9 32.3 0.67 Tasty Treasures Fancy Feast 53.7 41.0 2.8 64.5 11.9 0.83 Gravy Lovers Fancy Feast 43.9 -1.7 2.3 34.6 -4.4 1.27 Appetizers Category 1,914.9 4.6 2,119.0 -0.4 0.90 total Source: SymphonyIRI Group

Breakfast/Cereal/Snack Bars

With five of the top six brands, Kellogg's is the first name in the category, capturing almost 60% market share. Private label was a distant second at 8.1%, down 8.5% in dollars. General Mills took 5.7% market share. Overall the category was down in dollars (-5.5%) and units (-4.4%).

TOP VENDORS \$ SALES CHANGEVS SHARE UNIT SALES CHANGEYS AVG. (MILLIONS) YEAR AGO (MILLIONS) YEAR AGO PRICE PER UNIT Kellogg Co. \$668.8 \$3.1% 59.8% 214.7 -2.3% \$3.11 Private 91.2 -8.5 8.1 43.9 -8.3 2.08 label General 64.4 -10.9 5.7 24.6 -10.2 2.61 Mills Small Planet 47.5 22.2 4.2 29.0 26.6 1.64 Foods Atkins 33.6 21.4 3.0 5.3 20.2 6.29 Nutritionals Total U.S. sales through supermarkets; drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Kellogg's \$203.0 -3.5% 18.1% 65.3 -2.4% \$3.11 Kellogg's 167.6 -1.3 15.0 51.8 0.5 3.23 Rice Krispies Kellogg's 162.6 -22.0 14.5 52.2 -21.7 3.11 Special K Private 91.2 -8.5 8.1 43.9 -8.3 2.08 label Kellogg's 77.1 -9.2 6.9 23.6 -14.8 3.26 Special K Fruit Crisps Kellogg's 50.4 N/A 4.5 18.1 N/A 2.78 Special K Pastry Crisps Larabar 43.3 11.9 3.8 26.8 17.3 1.62 Atkins Day 33.6 21.4 3.0 5.3 20.2 6.29 Break Kashi TLC 23.2 -30.8 2.0 7.3 -30.3 3.15 General 16.6 7.2 1.4 6.2 0.1 2.66 Mills Lucky Charms Treats Category 1,117.3 -5.5 402.6 -4.4 2.77 total Source: SymphonyIRI Group

Margarine/Spreads/ Butter Blends

The category struggled through an off year as dollars were down 4.5% and units were down 6.4%. Unilever brands accounted for more than half of category sales. Overall, sales reached \$1.9 billion.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Unilever \$977.5 -3.5% 51.2% 372.8 -3.2% \$2.62 Bestfoods Nrth America ConAgra 322.6 -3.5 16.9 219.6 -7.6 1.47 Foods Smart 220.8 -14.9 11.6 65.1 -20.3 3.39 Balance Land 204.8 3.3 10.7 79.6 -1.2 2.57 O'Lakes Private 103.7 -8.1 5.4 64.7 -11.7 1.60 label Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. BRANDS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Shedd's \$315.6 -0.2% 16.5% 108.8 -0.5% \$2.90 Country Crock I Cant 287.7 -6.4 15.1 87.3 -7.4 3.30 Believe It's Not Butter Blue 198.1 -0.4 10.4 150.6 -5.0 1.32 Bonnet Smart 184.3 -11.3 9.7 53.6 -15.7 3.44 Balance Land 176.9 5.5 9.3 67.8 0.4 2.61 O'Lakes Private 103.7 -8.1 5.4 64.7 -11.7 1.60 label Shedd's 89.9 0.8 4.7 26.8 2.4 3.35 Country Crock Plus Imperial 84.7 7.8 4.4 80.8 4.8 1.05 I Cant 78.6 -5.3 4.1 25.9 -5.1 3.04 Believe It's Not Butter Light Parkay 73.3 -8.1 3.8 36.5 -13.3 2.01 Category 1,908.2 -4.5 840.2 -6.4 2.27 total Source: SymphonyIRI Group

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Refrigerated Butter Apparent price decreases led to greater units (5.1%) but decreased dollars (-3.8%). Private label accounted for more than 55% of dollars, though down 8%. Land O'Lakes was the top national brand, with 25% market share.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$1,055.9 -8.0% 55.1% 377.7 2.3% \$2.80 label Land 479.8 0.2 25.0 139.1 7.0 3.45 O'Lakes Challenge 74.4 -2.6 3.9 23.3 5.9 3.19 Dairy Products Kellers 73.4 1.8 3.8 27.2 3.9 2.69 Creamery Tillamook 29.3 -2.1 1.5 9.1 5.8 3.22 County Creamery Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$1,055.9 -8.0% 55.1% 377.7 2.3% \$2.80 label Land O'Lakes 476.6 -0.4 24.9 138.0 6.3 3.45 Challenge 68.5 -2.7 3.6 21.8 5.6 3.15 Butter Breakstone's 33.4 -4.7 1.7 13.1 -4.8 2.56 Tillamook 29.3 -2.1 1.5 9.1 1.0 8.3.22 Crystal 21.8 -11.1 1.1 7.3 -4.5 2.99 Farms Cabot 20.5 -2.7 1.1 6.4 3.9 3.19 Keller's 19.8 3.5 1.0 6.7 9.6 2.93 Hotel Bar 19.3 11.6 1.0 7.1 16.4 2.70 Smart 16.8 N/A 0.9 7.8 N/A 2.15 Balance Category 1,917.4 -3.8 641.7 5.1 2.99 total Source: SymphonyIRI Group

Cookies

Cookie sales are certainly not crumbling. The category continues to inch closer to \$7 billion in sales, up almost 5% versus last year. Consumer favorites are spread out as no national brand was able to capture double-digit market share.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Kraft \$2,515.8 5.4% -37.0% 877.4 1.5% \$2.87 Foods Private 1,041.2 0.5 15.3 462.6 -5.3 2.25 label Keebler 558.8 -4.1 8.2 209.3 -2.0 2.67 Co. McKee Foods 458.3 3.5 6.7 236.9 -2.3 1.93 Corp. Pepperidge 340.3 -2.8 5.0 113.5 0.1 3.00 Farm Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$1,041.2 0.5% 15.3% 462.6 -5.3% \$2.25 label Nabisco 528 2 3.9 7.7 167.4 3.1 3.16 Oreo Nabisco 519.8 0.3 7.6 198.8 -4.6 2.61 Chips Ahoy Nabisco 237.3 7.4 3.5 77.4 4.6 3.06 Oreo Double Stuf Little 210.3 3.1 3.1 111.8 -2.8 1.88 Debbie Lot t ho 185.8 12.1 2.7 51.6 3.8 3.59 use Little 148.0 4.0 2.1 73.9 -2.7 2.00 Debbie Nutty Bar Nabisco 131.8 6.4 1.9 38.6 3.3 3.41 Nilla Nabisco New 130.1 10.7 1.9 38.0 0.7 3.42 tons Pepperidge 98.0 -7.9 1.4 34.6 -6.9 2.83 Farm Milano Category 6,787.7 4.9 2,720.5 1.8 2.50 total Source: SymphonyIRI Group

Crackers

On the vendor side Kraft was king, (33.3% market share), but Pep-peridge Farm was the biggest gainer, up almost 10%. On the brand side Cheez It captured the top spot on the strength of \$590 million in sales. The category was up 5.1%

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Kraft \$1,567.8 2.7% 33.3% 576.9 2.5% \$2.72 foods Kellogg 831.5 6.5 17.7 281.3 4.8 2.95 Co. Pepperidge 726.3 9.9 15.4 282.8 9.3 2.57 Farm Keebler 477.3 -4.6 10.1 164.3 -4.1 2.90 Co. Private 223.8 1.6 4.7 122.6 0.7 1.82 label Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Sunshine \$590.7 7.8% 12.5% 200.0 5.8% \$2.95 Cheez It Nabisco 542.9 15.2 11.5 202.4 17.5 2.68 Ritz Pepperidge 423.4 14.2 9.0 161.5 13.4 2.62 Farm Goldfish Nabisco 364.1 5.5 7.7 130.7 5.9 2.79 Wheat Thins Nabisco 326.5 9.2 6.9 120.1 11.0 2.72 Triscuit Private 223.8 1.6 4.7 122.6 0.7 1.82 label Keebler 204.6 -1.0 4.3 72.9 -0.2 2.81 Club Stacy's 179.4 19.2 3.8 52.0 15.7 3.44 Pita Chips Snack 144.6 63.5 3.0 48.0 65.1 3.01 Factory Pretzel Crisps Kellogg's 136.4 25.9 2.9 46.3 27.3 2.94 Special K Category 4,697.8 5.1 1,723.3 4.4 2.73 total Source: SymphonyIRI Group

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Snack Nuts

Snack nuts were a hit last year. Dollars were up an impressive 11.2%, generating more than \$3.5 million. Store brands led with almost 30% of market share while the Planters brand was not far behind at 23.6%. Average price per unit increased to \$4.22.

TOP \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. VENDORS (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$1,061.2 10.4% 29.6% 249.0 4.4% \$4.26 label Kraft 967.7 1.4 27.0 176.0 -15.9 5.50 Foods Paramount 558.9 37.1 15.6 103.3 45.7 5.41 Farms Blue 308.8 25.6 8.6 75.2 17.5 4.10 Diamond Growers Diamond 176.8 -5.2 4.9 46.8 -12.1 3.78 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$ SALES CHANGE SHARE UNIT SALES CHANGE AVG. (MILLIONS) VS YEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$1,061.2 10.4% 29.6% 249.0 4.4% \$4.26 label Planters 845.4 0.8 23.6 154.6 -17.5 5.47 Wonderful 527.9 38.5 14.7 95.9 47.8 5.50 Blue 308.8 25.6 8.6 75.2 17.5 4.10 Diamond Emerald 171.4 -2.8 4.7 48.0 -11.0 3.72 Planters 83.7 51.3 2.3 14.9 38.6 5.59 Nutrition Hampton 53.5 18.0 1.5 18.7 7.6 2.86 Farms Everybody's 26.0 21.1 0.7 5.6 14.4 4.64 Nuts Hines 25.9 83.7 0.7 9.0 66.5 2.80 Imperial 24.1 6.4 0.6 8.7 -1.2 2.76 Nuts Category 3,580.3 11.2 848.0 2.6 4.22 total Source: SymphonyIRI Group

Cooking & Salad Oils

Wesson, Crisco and Mazola may be the big names, but store brands are bringing home the money. Private label accounted for 44.4% of dollars up 1.4%. Overall, the category was up 2.4%, generating almost \$1.9 billion in sales.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AGO VENDORS (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$840.3 1.4% 44.4% 201.8 -0.7% \$4.16 label ConAgra 322.5 1.2 17.0 64.1 -0.8 5.03 J. M. Smucker 234.8 -5.8 12.4 53.5 -8.1 4.39 Co. ACH Food 191.7 1.0 10.1 34.0 3.7 5.83 Companies Ventura 94.5 6.4 5.0 14.4 7.6 8.55 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AGO BRANDS (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$840.3 1.4% 44.4% 201.8 -0.7% \$4.16 label Wesson 322.5 1.2 17.0 64.1 -0.8 5.03 Cirisco 233.5 -5.5 12.3 53.1 -8.1 4.39 Mazola 168.2 1.7 8.8 28.1 5.4 5.97 Lou Ana 94.4 6.4 4 9 14.4 7.8 6.55 1 2 3 28.8 15.0 1.5 12.6 4.3 2.29 Spectrum 28.8 91.6 1.5 3.5 67.5 6.00 Naturals CWP 24.7 32.6 1.3 12.0 28.4 2.05 Smart 16.6 -15.1 0.9 4.5 -18.4 4.10 Balance Omega Mazola 11.7 -2.9 0.6 2.8 -2.9 4.15 Vegetable Plus Category 1,892.3 2.4 419.7 0.4 4.51 total Source: SymphonyIRI Group

Microwave Browning/Pan Spray

Not surprisingly, ConAgra's PAM controlled more than half of category sales and was up 4.3% in dollars. Private label is the only significant competition, with market share approaching 37%, up 5.8%.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AGO VENDORS (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT ConAgra \$169.3 4.8% 51.3% 62.0 -1.0% \$3.26 Foods Private 121.1 5.8 38.7 52.9 -1.5 2.29 label J.M. 18.8 18.0 4.7 6.8 11.7 2.28 Smucker Co. B&G Foods 9.6 -0.4 2.9 4.3 0.2 2.22 Smart 7.0 34.4 2.1 2.5 32.7 2.60 Balance Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE VS SHARE UNIT SALES CHANGE AGO (MILLION) TEAR AGO (MILLIONS) VS YEAR PRICE AGO PER UNIT PAM \$168.1 4.3% 51.0% 91.2 -2.1% \$3.28 Private 121.1 5.8 38.7 52.9 -1.5 2.29 label Crisco 14.2 16.7 4.3 6.3 11.1 2.27 Baker's 8.8 -2.8 2.7 4.0 -2.5 2.19 Joy Smart 6.6 29.4 2.1 2.4 27.7 2.80 Balance Omega Mazola 1.9 35.4 0.6 0.8 33.8 2.30 Winona 1.5 92.8 0.5 0.4 109.0 3.48 Pure Pillsbury 1.4 19.1 0.4 0.6 16.9 5.42 Naturally 1.2 1,177.6 0.4 0.7 948.1 1.69 Spectrum 1.1 24.8 0.3 0.2 21.2 6.60 Naturals Category 329.8 6.3 120.8 0.3 2.73 total Source: SymphonyIRI Group

Olive Oil

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

Olive oil dollars dipped a bit (-1.7%) while unit sales were identical to last year. Store brands were the best sellers at \$271.8 million, though down 6.0%. Sales for the top three national brands (Bertolli, Filippo Berio and Pompeian) were essentially flat.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AGO VENDORS (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$271.8 -6.0% 27.5% 43.4 -0.7% \$6.25 label Med Foods 211.6 -0.7 21.4 24.5 -0.9 8.64 Salov 144.2 1.4 14.5 19.0 7.1 7.68 S.P.A. Pompeian 81.8 0.1 8.2 13.4 -1.2 8.08 Colavita 34.0 -0.7 3.4 3.0 0.6 11.11 USA Total US. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AGO (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$271.8 -6.0% 27.5% 43.4 -0.7% \$6.25 label Bertolli 167.6 0.9 18.9 19.4 0.8 6.61 Filippo 143.8 1.3 14.5 18.9 7.0 7.57 Berio Pompeian 81.4 0.0 8.2 13.4 -1.4 6.08 Colavita 32.1 -4.7 3.2 2.8 -5.5 11.44 Star 29.7 -18.9 3.0 3.9 -17.8 7.52 Botticelli 21.0 0.2 2.1 2.8 4.2 7.43 Carapelli 20.9 -3.3 2.1 2.5 -4.0 6.06 Capatriti 16.3 18.5 1.6 1.6 30.0 9.70 Crisco 15.9 -22.3 1.6 3.2 -18.1 4.92 Category 988.4 -1.7 138.8 0.0 7.12 total Source: SymphonyIRI Group

Canned/Bottled Corn

Dollars in the category were flat while units decreased by 3.1%. Del Monte and General Mills continue to chase private label for the top spot. All three lost ground, however. The biggest brand gainer was Libby's, up 59% in dollars.

TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AGO (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$231.9 -2.6% 35.4% 335.5 -5.1% \$0.69 label Del Monte 188.5 -0.6 28.8 158.8 -12.4 1.19 Foods General 109.3 -5.2 16.7 96.4 -3.8 1.13 Mills Seneca 40.8 47.4 6.2 47.3 49.9 0.86 Foods Corp. Juanita's 22.7 6.3 3.5 10.1 1.9 2.24 Foods Total U.S. sales through supermarkets, drugstores, mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AGO (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$231.9 -2.6% 35.4% 335.5 -5.1% \$0.69 label Del Monte 134.0 -5.8 20.4 133.8 -14.8 1.00 Fresh Cut Green Giant 95.5 -4.1 14.6 87.8 -2.5 1.09 Libby's 37.4 59.0 5.7 43.5 68.7 0.86 Del Monte 30.0 23.0 4.6 6.2 18.1 4.86 Juanita's 22.7 6.3 3.5 10.1 1.9 2.24 Del Monte 17.5 10.8 2.7 12.0 4.6 1.45 Fresh Cut Specialties Bush's Best 12.7 1.5 1.9 7.8 -1.0 1.62 Green Giant 10.8 12.3 1.6 7.2 -16.1 1.47 Mexicorn Del Monte 6.5 -3.5 1.0 5.9 -0.1 1.11 Summer Crisp Category 655.2 1.0 702.5 -3.1 0.93 total Source: SymphonyIRI Group

Canned/Bottled Green Beans

Del Monte's Fresh Cut brand was down 7.7% in dollars. The more expensive Del Monte brand (\$4.73 per unit) was up 34%. Private label led the way with 35.5% market share.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AGO VENDORS (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Del Monte \$235.6 -0.5% 38.2% 185.9 -11.9% \$1.27 Foods Private 219.2 -1.8 35.5 306.8 -3.9 0.71 label General 51.6 -6.6 8.4 52.6 -1.2 0.98 Mills Seneca 38.1 45.0 5.7 43.3 41.4 0.81 Foods Corp. Aliens 30.7 -6.2 5.0 22.6 -10.0 1.36 Total U.S. sales through supermarkets drugstores mass merchandise outlets and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT SALES CHANGE AGO (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$219.2 -1.8% 35.5% 306.8 -3.9% \$0.71 label Del Monte 161.5 -7.7 26.2 151.0 -15.5 1.06 Fresh Cul Del Monte 47.0 34.0 7.8 9.9 26.3 4.73 Green Giant 41.8 -7.2 6.8 40.8 -1.3 1.02 Libby's 31.4 58.9 5.1 39.3 55.0 0.80 The Aliens 25.2 -6.3 4.1 15.5 -6.8 1.62 Del Monte 23.2 -4.0 3.8 15.8 -9.6 1.46 Fresh Cul Specialties Hanover 18.0 -1.0 2.9 8.4 -1.8 2.14 Green Giant 9.8 -3.9 1.6 11.7 -1.2 0.54 Kitchen Sliced Glory Foods 8.9 18.5 1.4 4.1 16.0 2.16 Category 617.5 0.6 641.7 -3.8 0.96 total Source: SymphonyIRI Group

Canned Mixed Vegetables

A numbers game: the grocery headquarters annual State of the Industry almanac takes a comprehensive look at dozens of supermarket categories.(The State of the I....

Consumers are eating their canned vegetables to the tune of \$123 million in sales. Private label led the way with \$33.2 million in sales good for 27.196 market share. Del Monte and Aliens round out the top of the vendor list at 23.3% and 21.8% respectively.

TOP \$SALES CHANGE SHARE UNIT SALES CHANGE AGO VENDORS (MILLION) VS TEAR (MILLIONS) VS
YEAR PRICE AGO AGO PER UNIT Private \$33.2 -3.3% 27.1% 46.3 -4.3% \$0.72 label Del Monte 28.6 1.0 23.3
24.2 -5.4 1.18 Foods Aliens 26.7 -3.2 21.8 20.2 -4.7 1.32 McCall 14.5 16.9 11.8 13.6 13.6 1.07 Farms Seneca 5.4
20.9 4.4 6.5 22.5 0.83 Foods Corp. Total U.S. sales through supermarkets, drugstores, mass merchandise outlets
and select club and dollar chains for the 52 weeks ended Jan. 27. TOP BRANDS \$SALES CHANGE SHARE UNIT
SALES CHANGE AGO (MILLION) VS TEAR (MILLIONS) VS YEAR PRICE AGO AGO PER UNIT Private \$33.2 -
3.3% 27.1% 46.3 -4.3% \$0.72 label Veg All 19.2 2.8 15.6 14.3 1.3 1.35 Del Monte 18.8 0.3 15.3 15.1 -6.7 1.24
Margaret 14.0 16.9 11.4 13.0 13.6 1.0B Holmes Libby's 5.3 29.9 4.4 6.4 35.4 0.83 Del Monte 4.3 7.1 3.5 4.7 0.7
0.90 Specialties Del Monte 3.5 12.0 2.9 2.5 6.6 1.41 Fresh Cut Specialties Le Sueur 3.4 -7.5 2.8 2.1 -17.4 1.64 Veg
All Home 3.4 -4.B 2.7 1.7 -5.4 1.93 style The Aliens 3.3 -28.0 2.7 3.2 -26.3 1.05 Category 122.7 0.9 120.2 -1.7 1.02
total Source: SymphonyIRI Group

Load-Date: June 9, 2018

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Lance[R] Sandwich Crackers Is Giving You 100 Days To Win \$100,000.

Benzinga.com

March 15, 2013

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ASAP

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Length: 604 words

Body

Byline: Newswire

To celebrate turning 100, Lance launches 100 days of prizes

CHARLOTTE, N.C., March 15, 2013 /PRNewswire-USNewswire/ -- In honor of the 100th anniversary of the Lance[R] brand, Lance sandwich crackers will be giving one lucky winner \$100,000 as part of its "100 Days To Win" sweepstakes.

(Photo: <http://photos.prnewswire.com/prnh/20130315/DC78207-INFO>)

The Lance[R] brand is celebrating its 100th anniversary in 2013 with a promise to continue giving consumers "more of what they love." During the "100 Days to Win" sweepstakes, which launched this week, consumers can visit www.Happy100Lance.com to participate in fun, family challenges for a chance to win one of several instant and weekly prizes, leading up to the grand prize of \$100,000. The challenges range from asking a simple question such as "How would you celebrate your 100th birthday?" to encouraging consumers to submit a photo of their family enjoying snack time.

"Lance has become the nation's favorite sandwich cracker over the last 100 years because of our loyal consumers, and we want to give them even 'more of what they love,'" said Tom Ingram, Senior Brand Director, Bakery at Snyder's-Lance, Inc. "The '100 Days to Win' sweepstakes, culminating with the \$100,000 grand prize, is one of the many ways we are thanking those who have made this milestone possible and making our birthday really special this year."

More than 500 consumers who complete at least one of the fun, daily challenges will instantly win a gift card or entertainment prize valued up to approximately \$70. Throughout the 100-day (or 14-week) challenge, a weekly prize will also be awarded in the form of gift cards for home improvement, entertainment or outdoor prizes valued up to approximately \$500.

The Lance "100 Days to Win" sweepstakes ends at 11:59 p.m. ET on June 18, 2013. For more information about the history of Lance[R] sandwich crackers and the 100th anniversary celebrations, visit the LanceSnacks Facebook page, www.lance.com or www.Happy100Lance.com.

About Lance[R] Sandwich Crackers

Lance[R] sandwich crackers and Lance[R] Cracker Creations[R] are available in nearly twenty varieties, including Toastchee[R], Whole Grain and the new Cracker Creations[R] Granola and 5 Grain varieties. Each product is made with freshly-baked, crispy crackers or granola wafers and real peanut butter, cheese, cream cheese or chocolate filling. Lance[R] sandwich crackers and Lance[R] Cracker Creations[R] have 0 grams trans fat, no preservatives

Lance[R] Sandwich Crackers Is Giving You 100 Days To Win \$100,000.

and no high fructose corn syrup. For more information about Lance[R] sandwich crackers, visit www.lance.com or the Lance Snacks Facebook page.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover[R], Lance[R], Cape Cod[R], **Pretzel Crisps[R]**, Krunchers![R], Tom's[R], Archway[R], Jays[R], Stella D'oro[R], Eatsmart[R], O-Ke-Doke[R], Grande[R] and Padrinos[R] brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G LNCE-E

SOURCE Lance[R] Sandwich Crackers

[Graphic omitted]

Load-Date: March 19, 2013

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Lance; R Sandwich Crackers Is Giving You 100 Days To Win \$100,000.

Benzinga.com

March 15, 2013

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Length: 604 words

Body

Byline: Newswire

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(Photo: <http://photos.prnewswire.com/prnh/20130315/DC78207-INFO>)

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"Lance has become the nation's favorite sandwich cracker over the last 100 years because of our loyal consumers, and we want to give them even 'more of what they love,'" said Tom Ingram, Senior Brand Director, Bakery at Snyder's-Lance, Inc. "The '100 Days to Win' sweepstakes, culminating with the \$100,000 grand prize, is one of the many ways we are thanking those who have made this milestone possible and making our birthday really special this year."

More than 500 consumers who complete at least one of the fun, daily challenges will instantly win a gift card or entertainment prize valued up to approximately \$70. Throughout the 100-day (or 14-week) challenge, a weekly prize will also be awarded in the form of gift cards for home improvement, entertainment or outdoor prizes valued up to approximately \$500.

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Lance; R Sandwich Crackers Is Giving You 100 Days To Win \$100,000.

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SOURCE Lance(R) Sandwich Crackers

[Graphic omitted]

Load-Date: March 19, 2013

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Lance® Sandwich Crackers Is Giving You 100 Days To Win \$100,000

PR Newswire

March 15, 2013 Friday 5:10 PM EST

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Dateline: CHARLOTTE, N.C., March 15, 2013

Body

To celebrate turning 100, Lance launches 100 days of prizes

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(Photo:<http://photos.prnewswire.com/prnh/20130315/DC78207-INFO>)

The Lance® brand is celebrating its 100th anniversary in 2013 with a promise to continue giving consumers "more of what they love." During the "100 Days to Win" sweepstakes, which launched this week, consumers can visit<http://www.Happy100Lance.com>to participate in fun, family challenges for a chance to win one of several instant and weekly prizes, leading up to the grand prize of \$100,000. The challenges range from asking a simple question such as "How would you celebrate your 100th birthday?" to encouraging consumers to submit a photo of their family enjoying snack time.

"Lance has become the nation's favorite sandwich cracker over the last 100 years because of our loyal consumers, and we want to give them even 'more of what they love,'" said Tom Ingram, Senior Brand Director, Bakery at Snyder's-Lance, Inc. "The '100 Days to Win' sweepstakes, culminating with the \$100,000 grand prize, is one of the many ways we are thanking those who have made this milestone possible and making our birthday really special this year."

More than 500 consumers who complete at least one of the fun, daily challenges will instantly win a gift card or entertainment prize valued up to approximately \$70. Throughout the 100-day (or 14-week) challenge, a weekly prize will also be awarded in the form of gift cards for home improvement, entertainment or outdoor prizes valued up to approximately \$500.

The Lance "100 Days to Win" sweepstakes ends at 11:59 p.m. ET on June 18, 2013. For more information about the history of Lance® sandwich crackers and the 100th anniversary celebrations, visit theLance Snacks Facebook page,<http://www.lance.com>or<http://www.Happy100Lance.com>.

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Lance® sandwich crackers and Lance® Cracker Creations® are available in nearly twenty varieties, including Toastchee®, Whole Grain and the new Cracker Creations® Granola and 5 Grain varieties. Each product is made with freshly-baked, crispy crackers or granola wafers and real peanut butter, cheese, cream cheese or chocolate filling. Lance® sandwich crackers and Lance® Cracker Creations® have 0 grams trans fat, no preservatives and no high fructose corn syrup. For more information about Lance® sandwich crackers, visit<http://www.lance.com>or theLance Snacks Facebookpage.

About Snyder's-Lance, Inc.

Lance® Sandwich Crackers Is Giving You 100 Days To Win \$100,000

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, **Pretzel Crisps®**, Krunchers!®, Tom's®, Archway®, Jays®, Stella D'oro®, Eatsmart®, O-Ke-Doke®, Grande® and Padrinos® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G LNCE-E

SOURCE Lance® Sandwich Crackers

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Lance Brand 'Relaunches' For 100th Anniversary

MediaPost.com

March 14, 2013

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Length: 677 words

Body

One hundred-year-old snack brand Lance is starting its next century with a repositioning that includes a redesigned logo and packaging, new product offerings and a consumer marketing push driven by social and digital platforms.

The first manifestation of the new marketing strategy is an anniversary campaign centered on a "100 Days to Win" social sharing program/sweeps/instant-win game.

Each day for 100 days (March 11 to June 18), consumers who register can participate in a new text- and photo-based challenge, announced on the Happy100Lance.com of the brand's Lance.com site. (For example, fans have been asked to snap and share photos of their families enjoying their favorite Lance snacks and photos of school lunches including Lance snacks, and to share about how has Lance been a part of their families over the years.)

Participants earn chances to win a grand prize of \$100,000, daily instant-win prizes (\$25 Visa gift cards and Six Flags tickets) and weekly prizes (\$500 Visa or retailer gift cards or a Six Flags adventure package). Consumers can participate online via social media and blogs, and can view all entries and the tally of prizes won to date.

Lance's overall new marketing strategy forgoes traditional media in favor of digital's greater targeting and brand-advocacy-building capabilities, according to Tom Ingram, senior brand director at parent company Snyder's-Lance, Inc. and Sloane Kelley, interactive strategy director at BFG, Lance's creative agency. The focus is leveraging digital and social to engage moms with content and fun activities they can enjoy with their kids, they report.

To support an ongoing series of engagement implementations going forward (apps may also be forthcoming), Lance's Web site, Facebook page (currently showing 68,000 "likes"), Twitter and Pinterest presences have all been relaunched.

The site, for example, now has a "snacktivities" tab with recipes, pairings and ways to decorate crackers with other edible elements to turn them into animal creations. Lance's social community managers are engaging consumers with similar content/ideas and questions that reflect the brand's voice, which Kelley describes as "approachable and fun" ("What's your family's favorite movie?," "Where is your favorite place to sneak away for a snack break?").

Lance's snack products span a wide variety of sandwich crackers, cookies, popcorn, and nuts and seeds. One new line is Toasty and ToastChee Xtra Fulls (filled with extra peanut butter), and new flavors within lines are being made available in multipacks, as well as other sizes, says Ingram.

Lance Brand 'Relaunches' For 100th Anniversary

Lance's is carried in grocery, mass, club, dollar and convenience stores throughout the country, and now derives a relatively small portion of its sales from third-party vending machines. However, its business model was not that long ago heavily reliant on company-owned vending machines (a business it exited in 2007, according to Hoover's).

Hence, Lance's marketing mission calls for educating consumers about the brand in the retail environment, as well as about its snack products, Ingram explains.

Digital marketing will be strategically supported by in-store promotion (for instance, in-store promotions will highlight new products and the "100 Days" promotion, encouraging consumers to access and participate in the activities/sweeps).

While Lance's is up against the likes of Frito-Lay, Mondelez International and Kellogg's snacks division, it's now part of a company that's grown significantly, particularly over the past decade or so.

The company changed its name to Snyder's-Lance in late 2010, after acquiring Snyder's of Hanover. Last year, it acquired Snack Factory (**Pretzel Crisps**). Other acquisitions have included Cape Cod Potato Chips and Tamming Foods (sugar wafers), in 1999; Tom's Foods (for \$40 million, in 2005); organic snack food maker Late July products (for \$2 million, in 2007); Archway and private-label gourmet cookie-maker Brent & Sam's (for \$31 million and \$23 million respectively, in 2008); and Stella D'Oro (for \$24 million in 2009).

Notes

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Classic Cape Cod® Flavor with 40% Less Fat

PR Newswire

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Dateline: HYANNIS, Mass., March 6, 2013

Body

Cape Cod Lightens Up Its Sea Salt & Cracked Pepper Variety

When it comes to Cape Cod® Potato Chips, sometimes less is more. This month the iconic New England brand adds 40% Less Fat Sea Salt & Cracked Pepper to its popular lineup of reduced fat kettle-cooked chips. A spin off from the classic salt and pepper flavor, the small-batch crafted kettle chip delivers the distinctive taste and crunch that Cape Cod fans love, but with 40% less fat than the leading brand of regular potato chips.

(Photo:<http://photos.prnewswire.com/prnh/20130306/DC71871>)

Cape Cod's 40% Less Fat Sea Salt & Cracked Pepper chips are made with real sea salt and a blend of peppercorns, including a slightly sweet premium white pepper. When added to the robust potato flavor and hearty crunch of a Cape Cod Potato Chip, this reduced fat snack is hard to resist.

Like all Cape Cod reduced fat varieties, 40% Less Fat Sea Salt & Cracked Pepper chips are kettle-cooked in 100% canola oil with no trans fat and contain no chemical additives or dehydrated potato flakes. The chips are made from fresh sliced potatoes, which are flash baked and spun to remove excess oil. This natural method of reducing the fat content ensures that the chips have the same unmistakable crunch and bold flavor as the original varieties. The new product joins the existing family of reduced fat chips offered by Cape Cod:

40% Reduced Fat Original 40% Less Fat Sea Salt & Vinegar 40% Less Fat Sweet Mesquite Barbeque 40% Less Fat Aged Cheddar & Sour Cream

In addition to these reduced fat varieties, Cape Cod's snack offerings also include half a dozen varieties of Original kettle-cooked potato chip flavors, as well as Waffle Cut and Chef's Recipe chip varieties. All Cape Cod Potato Chips are all-natural and preservative-free.

The well-known Cape Cod® lighthouse on the package makes it easy for consumers to find among the sea of salty snacks. An 8-ounce bag of the new 40% Less Fat variety retails around \$3.79 and can be found at major retailers or ordered online at CapeCodChips.com.

About Cape Cod Potato Chips

For 30 years the legendary crunch of Cape Cod® Potato Chips has made them a favorite on the Cape and across the U.S. Their distinctive crunch, flavor and freshness are a welcome discovery for those looking for an extraordinary snack. Cape Cod® Potato Chips are made with all-natural ingredients and are cooked in 100% canola oil with no trans fat or preservatives. Our process of cooking in only small kettle batches may take a little longer, but it offers a more satisfying and fulfilling snack experience. Cape Cod® Potato Chips are available at major U.S. retailers. Visit <http://www.CapeCodChips.com> or Facebook.com/CapeCodChips to locate a retailer or to order online.

Classic Cape Cod® Flavor with 40% Less Fat

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., (Nasdaq-GS: LNCE) headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio, and Ontario, Canada. Products are sold under the Snyder's of Hanover, Lance, Krunchers!, Cape Cod, EatSmart Naturals, **Pretzel Crisps**, Jays, Grande, Tom's, Archway, O-Ke-Doke, and Stella D'oro brand names along with a number of private label and third party brands. Products are distributed widely through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

SOURCE Cape Cod Potato Chips

CONTACT: Ashlene Larson, +1-410-234-2401/+1-443-406-0047, Ashlene.Larson@gkv.com; Jessica Farmer, +1-410-234-2531/+1-443-904-3456, Jessica.Farmer@gkv.com

Load-Date: March 7, 2013

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Classic Cape Cod; R Flavor with 40% Less Fat.

Benzinga.com

March 6, 2013

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Body

Byline: Newswire

Cape Cod Lightens Up Its Sea Salt & Cracked Pepper Variety

HYANNIS, Mass., March 6, 2013 /PRNewswire-USNewswire/ -- When it comes to Cape Cod(R) Potato Chips, sometimes less is more. This month the iconic New England brand adds 40% Less Fat Sea Salt & Cracked Pepper to its popular lineup of reduced fat kettle-cooked chips. A spin off from the classic salt and pepper flavor, the small-batch crafted kettle chip delivers the distinctive taste and crunch that Cape Cod fans love, but with 40% less fat than the leading brand of regular potato chips.

(Photo: <http://photos.prnewswire.com/prnh/20130306/DC71871>)

Cape Cod's 40% Less Fat Sea Salt & Cracked Pepper chips are made with real sea salt and a blend of peppercorns, including a slightly sweet premium white pepper. When added to the robust potato flavor and hearty crunch of a Cape Cod Potato Chip, this reduced fat snack is hard to resist.

Like all Cape Cod reduced fat varieties, 40% Less Fat Sea Salt & Cracked Pepper chips are kettle-cooked in 100% canola oil with no trans fat and contain no chemical additives or dehydrated potato flakes. The chips are made from fresh sliced potatoes, which are flash baked and spun to remove excess oil. This natural method of reducing the fat content ensures that the chips have the same unmistakable crunch and bold flavor as the original varieties. The new product joins the existing family of reduced fat chips offered by Cape Cod:

- * 40% Reduced Fat Original
- * 40% Less Fat Sea Salt & Vinegar
- * 40% Less Fat Sweet Mesquite Barbeque
- * 40% Less Fat Aged Cheddar & Sour Cream

In addition to these reduced fat varieties, Cape Cod's snack offerings also include half a dozen varieties of Original kettle-cooked potato chip flavors, as well as Waffle Cut and Chef's Recipe chip varieties. All Cape Cod Potato Chips are all-natural and preservative-free.

The well-known Cape Cod(R) lighthouse on the package makes it easy for consumers to find among the sea of salty snacks. An 8-ounce bag of the new 40% Less Fat variety retails around \$3.79 and can be found at major retailers or ordered online at CapeCodChips.com.

About Cape Cod Potato Chips

Classic Cape Cod; R Flavor with 40% Less Fat.

For 30 years the legendary crunch of Cape Cod(R) Potato Chips has made them a favorite on the Cape and across the U.S. Their distinctive crunch, flavor and freshness are a welcome discovery for those looking for an extraordinary snack. Cape Cod(R) Potato Chips are made with all-natural ingredients and are cooked in 100% canola oil with no trans fat or preservatives. Our process of cooking in only small kettle batches may take a little longer, but it offers a more satisfying and fulfilling snack experience. Cape Cod(R) Potato Chips are available at major U.S. retailers. Visit <http://www.CapeCodChips.com> or Facebook.com/CapeCodChips to locate a retailer or to order online.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., (Nasdaq-GS: LNCE) headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio, and Ontario, Canada. Products are sold under the Snyder's of Hanover, Lance, Krunchers!, Cape Cod, EatSmart Naturals, **Pretzel Crisps**, Jays, Grande, Tom's, Archway, O-Ke-Doke, and Stella D'oro brand names along with a number of private label and third party brands. Products are distributed widely through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

SOURCE Cape Cod Potato Chips

[Graphic omitted]

Load-Date: March 9, 2013

End of Document

VMG Partners Announces Promotion of Wayne Wu To Principal

PR Newswire

February 28, 2013 Thursday 8:15 AM EST

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Length: 506 words

Dateline: SAN FRANCISCO, Feb. 28, 2013

Body

VMG Partners, a private equity firm that specializes in investing in and building branded consumer product companies in the lower middle market, today announced the promotion of Wayne K. Wu to Principal.

"As we continue to grow and build our firm we are pleased to strengthen the management team by promoting from within our existing group of talented professionals," said Michael L. Mauzé, a Managing Director of VMG. "Since Wayne joined the firm he has been closely involved with a breadth of transactions across industries and played a leading role in our most recent investment in BabyGanics. He has worked closely with the management teams of our portfolio companies to build stronger and more enduring businesses and also served as a mentor to his colleagues. We are pleased with his progress within our organization and recognize his contributions with this promotion."

Mr. Wu joined VMG in 2008 as an Associate with diverse experience in transactions, operations, and accounting. Since then, he has worked on transactions across the firm's investment focus, including in the food, beverage, pet and household products, lifestyle, and personal care sectors. He was promoted to Vice President in 2010. As is typical for senior members of the firm, he is involved in originating new investment opportunities, due diligence on new business opportunities, structuring transactions, and working with partner companies. Prior to joining VMG, he was CFO and Vice President of Corporate Development for Thomason Autogroup. He also was an investment banker with RBC Capital Markets, and he began his career as an associate at Deloitte & Touche LLP. Mr. Wu currently serves on the Board of Directors of Mighty Leaf Tea, Speck Products, and BabyGanics, the pioneering lifestyle brand of safe and effective household and personal care products for families with babies and children. He received his B.S.C. from the Leavey School of Business at Santa Clara University and is a licensed CPA in the State of California.

About VMG Partners

VMG Partners is an investor in branded consumer products companies in the lower middle market. Since its inception in 2005, VMG has participated meaningfully in the better-for-you food and beverage sector with investments in Snack Factory **Pretzel Crisps®**, sold to Snyder's Lance in 2012, KIND Healthy Snacks, Pirate Brands Pirate's Booty, Mighty Leaf Tea, Sequel Naturals Vega® and Kernel Season's. Other investments within VMG's portfolio include Waggin' Train Pet Treats, sold to Nestle Purina PetCare Company in 2010, Natural Balance Pet Food, BabyGanics, Speck Products, Timbuk2, SkinMedica, sold to Allergan in 2012, and PLV Studio. VMG's defined set of target industries includes food, beverage, wellness, pet and household products, personal care and lifestyle brands. VMG Partners is headquartered in San Francisco and in Los Angeles. For more information about the fund please visit <http://www.vmgpartners.com>.

Contact:

Chris Tofalli

Chris Tofalli Public Relations, LLC

VMG Partners Announces Promotion of Wayne Wu To Principal

914-834-4334

SOURCE VMG Partners

Load-Date: March 1, 2013

End of Document

BLOG: Stylize: Gilt City Boston Warehouse Sale: It's Back

Stylize

February 27, 2013 Wednesday 11:07 PM EST

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Length: 300 words

Byline: Sara Gaynes

Body

Feb 27, 2013 (Stylize:<http://www.bostonherald.com/blogs/entertainment/stylize/> Delivered by Newstex)

Feb. 27--We're so glad Gilt City [<http://www.giltcity.com/boston>] is bringing their famed warehouse sale back to town next weekend (March 8-9). Tickets go on sale tomorrow, ranging in price (more expensive tickets get earlier access) for the event at Artists for Humanity, 100 W 2nd St. on Friday from 9:30-11:30 p.m. and Saturday from 9 a.m. to 5 p.m.

http://farm9.staticflickr.com/8524/8514334982_be84e34b54.jpg [
http://farm9.staticflickr.com/8524/8514334982_be84e34b54.jpg]

The deep discounts on designer duds aren't for the faint of heart, though. If you're serious about scoring at the sale, check out Gilt's tips for going home with the best merchandise:

- Early Bird Gets The Worm. Buy your tickets early to get your ideal time slot -- but don't be heartbroken if you don't get one of the earlier sessions. We are constantly restocking and replenishing inventory!
- Whats Happening? Before you even go to the sale -- make a list of upcoming events -- ie. birthdays, anniversaries, parties, and go into the sale with a plan. You'll leave with some steals for those special occasions.
- Plastic Please. No cash. Bring your debit or credit cards!
- Think Ahead. Don't be afraid to shop for future seasons. It's a great chance to score designer ski or swimwear.
- Take a Risk. Always been afraid to invest in a high priced trend? Now's your chance to score those trends for less at the Boston Warehouse Sale, so go with an open mind.

In addition to the sale, a ticket gets you complimentary refreshments from AQUAhydrate and Coco Cafe, a bar sponsored by La Marca Prosecco, a \$20 Uber gift card (for new users), a SMART Pics photo kiosk, a live DJ and probably all the **Pretzel Crisps** you can eat.

Load-Date: February 27, 2013

End of Document



Snyder's-Lance to close bakery in Canada

Charlotte Business Journal

February 26, 2013 Tuesday

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CHARLOTTE BUSINESS JOURNAL

Length: 308 words

Byline: Staff

Body

Snack producer Snyder's-Lance Inc. is closing a bakery operation in Canada, saying its production will be shifted to other company facilities.

The number of workers affected by the shutdown wasn't immediately available.

The facility in Cambridge, Ontario, will close May 17, the company says.

In a statement, Charlotte-based Snyder's-Lance (NASDAQ:LNCE) says it "conducted a comprehensive review of current manufacturing facilities including capacity, capabilities and distribution costs to key markets. Based on that review, management has decided to close the Cambridge facility in order to reduce operating costs while consolidating production into other existing manufacturing sites."

Affected workers will receive severance and outplacement benefits and may be considered for other jobs with the company.

Snyder's-Lance products are sold under brand names that include Snyder's of Hanover, Lance, Cape Cod, Tom's, Archway and **Pretzel Crisps**, as well as private-label and third-party brands.

The company has more than 1,000 employees in Charlotte and operates manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario.

Earlier this month, Snyder's-Lance Inc. reported net income of \$7.8 million, or 11 cents per diluted share, for its fourth quarter ended Dec. 29, down from \$22.6 million, or 33 cents per share, in the corresponding period in 2011.

Excluding special items, which include an \$11.5 million impairment charge, Snyder's-Lance earned \$20.4 million in the fourth quarter, an increase of 20 percent over the comparable figure for a year earlier.

The company is celebrating 100 years in the snack business.

Did you find this article useful? Why not subscribe to Charlotte Business Journal for more articles and leads? Visit bizjournals.com/subscribe or call 1-866-853-3661.

Load-Date: February 26, 2013

Snyder's-Lance to close bakery in Canada

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US: Snyder's-Lance to shutter Ontario plant.

just-food.com

February 26, 2013

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Length: 555 words

Body

Byline: Michelle Russell

US snack manufacturer Snyder's-Lance is to close its bakery facility in Ontario as part of a company-wide review.

In a statement yesterday (25 February), the firm said its plant in Cambridge will close on 17 May. The company did not say how many jobs might be at risk as a result of the closure.

"Snyder's-Lance conducted a comprehensive review of current manufacturing facilities including capacity, capabilities and distribution costs to key markets," Snyder's-Lance said. "Based on that review, management has decided to close the Cambridge facility in order to reduce operating costs while consolidating production into other existing manufacturing sites."

The company said it is providing impacted staff with "severance and outplacement benefits" and will offer them the opportunity to be considered for jobs at other Snyder's-Lance facilities.

In 2012, the firm closed two facilities in Texas: a manufacturing plant in Corsica and a distribution centre in Greenville.

Last week, Snyder's issued a 2013 profit forecast below Wall Street consensus, sending shares down. The company saw its profits increase in 2012 but the company closed the year with a fall in earnings in the fourth quarter.

Press release follows:

Snyder's-Lance Announces Plant Closing - Cambridge, Ontario

CHARLOTTE, N.C., Feb. 25, 2013 /PRNewswire/ --Snyder's-Lance Inc. (NASDAQ-GS: LNCE) today announced plans to close its bakery facility in Cambridge, Ontario effective May 17, 2013.

(Logo: <http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

Snyder's-Lance conducted a comprehensive review of current manufacturing facilities including capacity, capabilities and distribution costs to key markets. Based on that review, management has decided to close the Cambridge facility in order to reduce operating costs while consolidating production into other existing manufacturing sites.

The Company is providing impacted associates with severance and outplacement benefits as well as the opportunity to be considered for jobs that may exist in other Snyder's-Lance facilities.

US: Snyder's-Lance to shutter Ontario plant.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada.

Products are sold under the Snyder's of Hanover®; Lance®; Cape Cod®; Pretzel Crisps®; Krunchers!®; Tom's®; Archway®; Jays®; Stella D'oro®; Eatsmart®; O-Ke-Doke®; Grande®; and Padrinos® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

SOURCE Snyder's-Lance, Inc.

CONTACT: Heather Woolford, associate director of public relations, GKV, +1-410-234-2519

Original source: Snyder's-Lance

This article was originally published on just-food.com on 26 February 2013. For authoritative and timely food business information visit <http://www.just-food.com>.

Load-Date: February 27, 2013

End of Document

Snyder's-Lance Announces Plant Closing - Cambridge, Ontario

PR Newswire

February 25, 2013 Monday 4:30 PM EST

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Length: 291 words

Dateline: CHARLOTTE, N.C., Feb. 25, 2013

Body

Snyder's-Lance Inc. (NASDAQ-GS: LNCE) today announced plans to close its bakery facility in Cambridge, Ontario effective May 17, 2013.

(Logo:<http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

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SOURCE Snyder's-Lance, Inc.

CONTACT: Heather Woolford, associate director of public relations, GKV, +1-410-234-2519

Load-Date: February 26, 2013

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Snyder's-Lance Announces Plant Closing - Cambridge, Ontario.

Benzinga.com

February 25, 2013

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Length: 293 words

Body

Byline: Newswire

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Products are sold under the Snyder's of Hanover(R), Lance(R), CapeCod(R), **Pretzel Crisps(R)**, Krunchers!(R), Tom's(R), Archway(R), Jays(R), Stella D'oro(R), Eatsmart(R), O-Ke-Doke(R), Grande(R) and Padrinos(R) brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

SOURCE Snyder's-Lance, Inc.

[Graphic omitted]

Load-Date: February 27, 2013

End of Document

Snyder's-Lance, Inc. Announces Webcast of Investor Presentation on Tuesday, February 26th at 8:45 am Eastern

PR Newswire

February 21, 2013 Thursday 10:30 AM EST

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Length: 368 words

Dateline: CHARLOTTE, N.C., Feb. 21, 2013

Body

Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that the Company is scheduled to webcast a presentation to investors and analysts, live from NASDAQ MarketSite in New York City, beginning at approximately 8:45 am ET on Tuesday, February 26, 2013. Following the presentation, management will host a question and answer session with investors attending this event. The question and answer session will also be webcast live. Participants from management include Dave Singer, Chief Executive Officer, Carl Lee, Jr., President and Chief Operating Officer, Rick Puckett, Executive Vice President and Chief Financial Officer and Mark Carter, Vice President and Investor Relations Officer.

(Logo: <http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

The live audio webcast of the meeting and an accompanying slide presentation may be accessed beginning at 8:45 am ET on February 26th from the Investor Relations section of the Company's website, <http://www.snyderslance.com>. Investors may also access a web-based replay for up to 30 days following the meeting at <http://www.snyderslance.com>.

For more information please contact investor relations at 212-827-3746.

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SOURCE Snyder's-Lance, Inc.

CONTACT: Mark Carter, VP and Investor Relations Officer, +1-704-557-8386, or Joe Calabrese, Financial Relations Board, +1-212-827-3772

Load-Date: February 22, 2013

Snyder's-Lance, Inc. Announces Webcast of Investor Presentation on Tuesday, February 26th at 8:45 am
Eastern

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Snyder's-Lance, Inc. Announces Webcast of Investor Presentation on Tuesday, February 26th at 8:45 am Eastern.

Benzinga.com

February 21, 2013

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Length: 359 words

Body

Byline: Newswire

CHARLOTTE, N.C., Feb. 21, 2013 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that the Company is scheduled to webcast a presentation to investors and analysts, live from NASDAQ MarketSite in New York City, beginning at approximately 8:45 am ET on Tuesday, February 26, 2013. Following the presentation, management will host a question and answer session with investors attending this event. The question and answer session will also be webcast live. Participants from management include Dave Singer, Chief Executive Officer, Carl Lee, Jr., President and Chief Operating Officer, Rick Puckett, Executive Vice President and Chief Financial Officer and Mark Carter, Vice President and Investor Relations Officer.

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SOURCE Snyder's-Lance, Inc.

[Graphic omitted]

Load-Date: February 26, 2013

Snyder's-Lance, Inc. Announces Webcast of Investor Presentation on Tuesday, February 26th at 8:45 am Eastern.

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Snyder's-Lance Q4 net income decreases

MarketLine NewsWire (Formerly Datamonitor)

February 21, 2013 Thursday 5:34 AM GMT

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Section: FOOD

Length: 260 words

Highlight: Snyder's-Lance, Inc., a salty snack maker, has reported that net income attributable to the company for the fourth quarter ended December 29, 2012 was \$7.78 million, or \$0.11 per share, compared to \$22.43 million, or \$0.33 per share, for the fourth quarter ended December 31, 2011.

Body

Net revenue for the fourth quarter ended December 29, 2012 was \$419.83 million, compared to \$412.13 million for the fourth quarter ended December 31, 2011. Net income attributable to the company for the year ended December 29, 2012 was \$59.08 million, or \$0.85 per diluted share, compared to \$38.26 million, or \$0.56 per diluted share, for the year ended December 31, 2011. Net revenue for the year ended December 29, 2012 was \$1.62 billion, compared to \$1.63 billion for the year ended December 31, 2011. "This was an important and successful year for Snyder's-Lance," commented David V. Singer, CEO. "During 2012, we grew our earnings more than 35%, excluding special items, and grew our sales by 2.2% when the impact of our IBO conversion is excluded.

We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover, Lance and Cape Cod, and we acquired Snack Factory and the fast growing **Pretzel Crisps** brand. In 2012, we also invested in capacity and innovation capabilities while we improved margins on our non-branded items by discontinuing sales to certain customers who did not accept price increases. In the coming year, we'll continue to build on this solid foundation as we drive for results that grow our top line and expand our margins through innovation and continued strong execution in the marketplace. Our new R&D center will open in 2013, and it will support aggressive innovation goals for our future."

Load-Date: February 27, 2013

End of Document

Snyder's-Lance Posts Full Year 2012 Results

Entertainment Close-up

February 19, 2013 Tuesday

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Length: 799 words

Body

Snyder's-Lance, Inc. reported results for its fiscal year 2012.

In a release dated Feb. 12, the Company said that net revenues for the year ended Dec. 29, 2012, were \$1.62 billion, a decrease of 1.0 percent from prior year net revenues of \$1.64 billion.

Net revenue, when adjusted for the impact of the independent business owner route system conversion, increased 2.2 percent year over year. The Company realized full year net income of \$66.1 million, excluding special items, or \$0.95 per diluted share, as compared to full year 2011 net income of \$47.8 million, excluding special items, or \$0.70 per diluted share. Net income, including special items, was \$59.1 million, or \$0.85 per diluted share, for the full year 2012 compared to \$38.3 million, or \$0.56 per diluted share, for 2011.

Special items for 2012 were \$7.0 million, after tax expense, and included approximately \$2.6 million in severance costs and professional fees related to merger and integration activities, approximately \$6.6 million in asset impairment charges, approximately \$4.9 million in charges related to consolidation activities, and approximately \$1.2 million in expenses associated with the acquisition of Snack Factory. Special items for 2012 also included gains on the sale of route businesses of approximately \$8.3 million, net of the incremental taxes incurred on these gains. Special items, after tax expense, for 2011 included approximately \$12.8 million of severance and professional fee expenses associated with merger and other integration efforts, approximately \$6.5 million related to the impairment of transportation equipment, and approximately \$1.7 million of impairment charges related to the closing of a manufacturing facility in Corsicana, Texas. Special items for 2011 also included after-tax gains on the sale of route businesses of approximately \$5.0 million and approximately \$6.5 million related to a change in vacation plan.

Fourth quarter 2012 net revenues were \$420 million including sales of **Pretzel Crisps**, an increase of 1.9 percent compared to prior year fourth quarter net revenues of \$412 million. Fourth quarter 2012 net income was \$20.4 million, excluding special items, which was 44.4 percent above the \$14.1 million of net income, excluding special items for the prior year. Net income including special items was \$7.8 million for the fourth quarter 2012 compared to a fourth quarter 2011 net income including special items of \$22.4 million.

"This was an important and successful year for Snyder's-Lance," said David Singer, Chief Executive Officer. "During 2012, we grew our earnings more than 35 percent, excluding special items, and grew our sales by 2.2 percent when the impact of our IBO conversion is excluded. We completed our merger integration, while we also

Snyder's-Lance Posts Full Year 2012 Results

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"As we recently announced, I have elected to retire from my role as CEO following our annual shareholders meeting on May 3. Carl E. Lee, Jr. our President and COO, will take on the title of CEO at that time. Our plans for 2013 and beyond look very bright, and with Carl's exceptional leadership, I am confident in our ability to grow the Company and drive shareholder value as we expand our reach to new consumers and markets."

Dividend Declared

The Company also announced the declaration of a quarterly cash dividend of \$0.16 per share on the Company's common stock. The dividend is payable on March 6, to stockholders of record at the close of business on Feb. 27.

Estimates provided for 2013 The Company estimates that its net revenue for the full year 2013 will be up 10 percent to 12 percent when compared to 2012. Estimates for earnings per diluted share show an increase between 22 percent and 32 percent compared to 2012 earnings per diluted share, excluding special items. Capital expenditures for 2013 are projected to be between \$78 and \$83 million as investments are made in plant improvements, quality, capacity and innovation.

Snyder's-Lance, Inc. manufactures and markets snack foods.

((Comments on this story may be sent to newsdesk@closeupmedia.com))

Load-Date: February 18, 2013

End of Document

Snyder's-Lance Posts Full Year 2012 Results; Financial report

Entertainment Close-up

February 19, 2013

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Length: 797 words

Body

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Net revenue, when adjusted for the impact of the independent business owner route system conversion, increased 2.2 percent year over year. The Company realized full year net income of \$66.1 million, excluding special items, or \$0.95 per diluted share, as compared to full year 2011 net income of \$47.8 million, excluding special items, or \$0.70 per diluted share. Net income, including special items, was \$59.1 million, or \$0.85 per diluted share, for the full year 2012 compared to \$38.3 million, or \$0.56 per diluted share, for 2011.

Special items for 2012 were \$7.0 million, after tax expense, and included approximately \$2.6 million in severance costs and professional fees related to merger and integration activities, approximately \$6.6 million in asset impairment charges, approximately \$4.9 million in charges related to consolidation activities, and approximately \$1.2 million in expenses associated with the acquisition of Snack Factory. Special items for 2012 also included gains on the sale of route businesses of approximately \$8.3 million, net of the incremental taxes incurred on these gains. Special items, after tax expense, for 2011 included approximately \$12.8 million of severance and professional fee expenses associated with merger and other integration efforts, approximately \$6.5 million related to the impairment of transportation equipment, and approximately \$1.7 million of impairment charges related to the closing of a manufacturing facility in Corsicana, Texas. Special items for 2011 also included after-tax gains on the sale of route businesses of approximately \$5.0 million and approximately \$6.5 million related to a change in vacation plan.

Fourth quarter 2012 net revenues were \$420 million including sales of **Pretzel Crisps**, an increase of 1.9 percent compared to prior year fourth quarter net revenues of \$412 million. Fourth quarter 2012 net income was \$20.4 million, excluding special items, which was 44.4 percent above the \$14.1 million of net income, excluding special items for the prior year. Net income including special items was \$7.8 million for the fourth quarter 2012 compared to a fourth quarter 2011 net income including special items of \$22.4 million.

"This was an important and successful year for Snyder's-Lance," said David Singer, Chief Executive Officer. "During 2012, we grew our earnings more than 35 percent, excluding special items, and grew our sales by 2.2 percent when the impact of our IBO conversion is excluded. We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover, Lance and Cape Cod, and we acquired Snack Factory and the fast growing **Pretzel Crisps** brand. In 2012, we also invested in capacity and innovation capabilities while we improved margins on our non-branded items by discontinuing sales to certain customers who did not accept price increases. In the coming year, we'll continue to build on this solid foundation as we drive for results that grow our top line and expand our margins through innovation and continued strong execution in the marketplace. Our new R&D center will open in 2013, and it will support aggressive innovation goals for our future."

Snyder's-Lance Posts Full Year 2012 Results; Financial report

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The Company also announced the declaration of a quarterly cash dividend of \$0.16 per share on the Company's common stock. The dividend is payable on March 6, to stockholders of record at the close of business on Feb. 27.

Estimates provided for 2013 The Company estimates that its net revenue for the full year 2013 will be up 10 percent to 12 percent when compared to 2012. Estimates for earnings per diluted share show an increase between 22 percent and 32 percent compared to 2012 earnings per diluted share, excluding special items. Capital expenditures for 2013 are projected to be between \$78 and \$83 million as investments are made in plant improvements, quality, capacity and innovation.

Snyder's-Lance, Inc. manufactures and markets snack foods.

((Comments on this story may be sent to newsdesk@closeupmedia.com))

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Snyder's-Lance kicks off 100-year celebration

Charlotte Business Journal

February 19, 2013 Tuesday

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CHARLOTTE BUSINESS JOURNAL

Length: 294 words

Byline: Ken Elkins

Body

Snyder's-Lance Inc. is celebrating 100 years in the snack-food business with some improvements to its products, a \$1.5 million charitable giving program and social-media contests.

The Charlotte-based snack maker started as Lance in 1913, when food broker Philip Lance devised innovative ways to sell 500 pounds of unwanted peanuts.

First came nickel-a-bag peanuts sold on the streets of Charlotte. Then Lance expanded into peanut butter and, later, the iconic Lance peanut butter sandwich cracker.

Today, the company has more than 1,000 employees in Charlotte and operates manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada.

Snyder's-Lance products are sold under brand names that include Snyder's of Hanover, Lance, Cape Cod, Tom's, Archway and **Pretzel Crisps**, as well as private-label and third-party brands.

Last month, its chief executive, David Singer, announced that he will retire after the company's annual meeting on May 3. He'll be replaced by Carl Lee Jr., who has been president and chief operating officer since late 2010.

As part of its 100-year anniversary, Snyder's-Lance will introduce two innovations to its sandwich-cracker products by adding extra peanut butter. The crackers will be called Xtra Fulls Toastchee and Xtra Fulls Toasty.

The company also is making improvements to existing sandwich-cracker products.

In addition, Snyder's-Lance will award \$1.5 million in one-time grants to 13 Charlotte-area nonprofits. And next month, the company will launch sweepstakes on Facebook and on the Web.

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America's Favorite Sandwich Cracker Celebrates 100 Years

PR Newswire

February 18, 2013 Monday 12:28 PM EST

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Length: 1019 words

Dateline: CHARLOTTE, N.C., Feb. 18, 2013

Body

Lance® has been satisfying America's snacking appetite for 100 years - and this is just the beginning. The brand is celebrating its 100th anniversary in 2013 with product launches and improvements, social media giveaways and a promise to continue giving consumers "more of what they love."

(Photo:<http://photos.prnewswire.com/prnh/20130218/DC61175>)

"Turning 100 years old is a big moment for any brand, but when you're the nation's favorite snack cracker, it's a really big opportunity to do something special," said Tom Ingram, Senior Brand Director, Bakery at Snyder's-Lance, Inc. "To celebrate a century of Lance, we will show appreciation to our loyal fans by giving them 'more of what they love.'"

100 Years of Innovation

Born out of innovation, the story of the Lance® brand begins one hundred years ago, when Philip L. Lance, a Charlotte, N.C. food broker, turned 500 pounds of unwanted peanuts into an entrepreneurial endeavor. Philip Lance began selling the peanuts on the street for a nickel a bag. He soon expanded his peanut business to include peanut butter, and shortly after, the first peanut butter sandwich cracker was born.

The Lance® product line expanded again when an American soldier gave the company his mother's recipe for peanut brittle. The peanut brittle, now known as Peanut Bar, remains an important part of Lance's® product line. The brand has since added nuts, seeds, cookies and popcorn varieties to its product offerings.

From the streets of Charlotte to the homes of families across America, Lance continues to innovate. Lance was the first company to make significant nutritional changes as part of its Snack Right campaign in 1988. More recent product innovation milestones include:

2004 - Lance eliminates trans fats from its products. 2008 - Lance eliminates high-fructose corn syrup from all sandwich cracker products. 2009 - Lance adds Whole Grain sandwich crackers and 100 Calorie pouches to its product line. 2011 - Lance launches Cracker Creations®, a line of premium, all-natural sandwich crackers.

As part of its ongoing celebrations in 2013, Lance is introducing Xtra Fulls(TM) Toastchee® and Xtra Fulls(TM) Toasty(TM). The new products, the lead items to celebrate Lance's 100th Anniversary, offer more peanut butter filling for an extra satisfying snacking experience. Over the years, more peanut butter has been a top consumer request and Lance is responding by giving consumers "more of what they love" - real peanut butter, freshly-ground in Georgia. Xtra Fulls(TM) offer up to 6 grams of protein per serving and, like all Lance® sandwich crackers, contain no preservatives. In mid-April, Lance will also unveil product extensions for its Cracker Creations®, Captain's Wafers® sandwich crackers and Nekot® cookies.

America's Favorite Sandwich Cracker Celebrates 100 Years

In addition to the new products being introduced, Lance will complete several product improvements this year, including using a creamier peanut butter filling and increasing the number of whole grains in its Whole Grain sandwich crackers.

100 Days of Celebrations

As a thank you to consumers, Lance will host the "100 Days to Win Snack Challenge" from March through June. The sweepstakes will launch March 11 on the Lance SnacksFacebook pageand at Happy100Lance.com. Consumers can take daily "Snacking Challenges" for a chance to win instant and weekly prizes, in addition to the \$100,000 grand prize to fulfill their ultimate birthday wish.

For more information about the history of Lance® sandwich crackers and the 100th anniversary celebrations, visit the Lance Snacks Facebook page,<http://www.lance.comor> Happy100Lance.com (after March 11).

100 Years of Giving Back

Lance has a long history of supporting a variety of causes and organizations. In 2012 the Lance Foundation announced that in recognition of the upcoming 100-year anniversary of the Lance® brand, it would make one-time grants totaling \$1.5 million to 13 Charlotte-area nonprofit organizations. These grants benefit programs that are closely aligned with the Foundation's focus areas of supporting education, championing healthy living, fighting hunger and assisting military causes.

The Lance Foundation is managed by the parent company, Snyder's-Lance, Inc. Snyder's-Lance has a long history of supporting a variety of causes and organizations in both the Charlotte community and those communities where the company has operations. For more information on Snyder's-Lance's commitment to corporate responsibility, please visit<http://www.snyderslance.com/community>.

About Lance® Sandwich Crackers

Lance® sandwich crackers and Lance ®Cracker Creations® are available in more than two dozen varieties, including Toastchee®, Whole Grain and the new Cracker Creations® Granola and 5 Grain varieties. Each product is made with freshly-baked, crispy crackers or granola wafers and real peanut butter, cheese, cream cheese or chocolate filling. Lance® sandwich crackers and Lance® Cracker Creations® have 0 grams trans fat, no preservatives and no high fructose corn syrup. For more information about Lance® sandwich crackers, visit<http://www.lance.comor> theLance Snacks Facebookpage.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, **Pretzel Crisps®**, Krunchers!, Tom's®, Archway®, Jays®, Stella D'oro®, Eatsmart®, O-Ke-Doke®, Grande® and Padrinos® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

SOURCE Lance® Sandwich Crackers

CONTACT: Ashlene Larson, +1-410-234-2401/ +1-443-406-0047, Ashlene.larson@gkv.com

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America's Favorite Sandwich Cracker Celebrates 100 Years

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Snyder's-Lance Reports Full Year 2012 Results

Food & Beverage Close-up

February 15, 2013 Friday

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Length: 799 words

Body

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"This was an important and successful year for Snyder's-Lance," said David Singer, Chief Executive Officer. "During 2012, we grew our earnings more than 35 percent, excluding special items, and grew our sales by 2.2 percent when the impact of our IBO conversion is excluded. We completed our merger integration, while we also

Snyder's-Lance Reports Full Year 2012 Results

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Snyder's-Lance, Inc. manufactures and markets snack foods.

((Comments on this story may be sent to newsdesk@closeupmedia.com))

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Food & Beverage Close-Up

February 15, 2013

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Snyder's-Lance, Inc. manufactures and markets snack foods.

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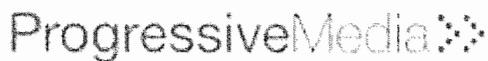
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Snyder's-Lance posts 65.3% decline in Q4 net earnings

Progressive Media - Company News

February 14, 2013 Thursday

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Section: WATER & WASTE WATER MANAGEMENT; Company News

Length: 296 words

Highlight: US-based snack food company Snyder's-Lance has reported a 65.3% decline in net earnings to \$7.78m for the fourth quarter of 2012, compared to \$22.43m for the same period in 2011, due to increased impairment charges.

Body

US-based snack food company Snyder's-Lance has reported a 65.3% decline in net earnings to \$7.78m for the fourth quarter of 2012, compared to \$22.43m for the same period in 2011, due to increased impairment charges.

For the quarter ended on 29 December, the company posted a 1.86% increase in net revenue to \$419.83m, compared to \$412.13m in fiscal 2011.

For the full-year 2012, Snyder's-Lance reported a 54.4% increase in net earnings to \$59.09m, compared to \$38.26m in 2011, while net revenue decreased 1.2% to \$1.62bn, compared to \$1.64bn in the previous year.

Snyder's-Lance chief executive officer David Singer said that during 2012 the company increased earnings by more than 35%, excluding special items, and grew sales by 2.2% when the impact of its IBO conversion is excluded.

The company completed its merger integration, and also rolled out and began to implement its strategic plan, Singer said.

"In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover®, Lance® and Cape Cod®, and we acquired Snack Factory® and the fast-growing **Pretzel Crisps®** brand," Singer added.

For fiscal 2013, the company expects 10% to 12% increase in net revenues, and an increase between 22% and 32% for earnings per diluted share, compared to 2012, excluding special items.

Meanwhile, the company announced that its president and COO Carl Lee will be taking over as the new CEO replacing David Singer, who will retire in May.

Snyder's-Lance, headquartered in Charlotte, North Carolina, produces pretzels, sandwich and restaurant style crackers, potato chips, cookies, tortilla chips, nuts and other snacks.

Image: For the full-year 2012, Snyder's-Lance reported a 54.4% increase in net earnings to \$59.09m. Photo courtesy of PRNewsFoto/Snyder's-Lance, Inc.

Load-Date: February 15, 2013

Snyder's-Lance posts 65.3% decline in Q4 net earnings

End of Document

US: Snyder's-Lance 2013 outlook below Wall St estimates.

just-food.com

February 13, 2013

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Length: 1482 words

Body

Byline: Dean Best

US snack manufacturer Snyder's-Lance has set 2013 forecasts below Wall Street consensus, hitting the company's shares.

Shares in Snyder's-Lance closed down 3.26% at \$25.25 yesterday (12February) after an earnings forecast that lower than analysts' predictions.

"Initial 2013 EPS guidance at the high end is a penny light of consensus and figures to be a slight disappointment for investors," Janney Montgomery Scott analyst Jonathan Feeney said.

The company said earnings per share, excluded special items, would be up 22-32% in 2013. For the year to 29 December, adjusted EPS was \$0.95.

Snyder's-Lance saw its profits increase in 2012 but the company closed the year with a fall in earnings in the fourth quarter.

Snyder's-Lance booked net income of US\$59.1m for last year, compared to \$38.3m in 2011. The increase in annual profits came despite a 1% dip in reported revenues to \$1.64bn. However, Snyder's-Lance benefited from lower SG&A costs in 2012.

In the fourth quarter of the year, net income more than halved, reaching \$7.8m, against \$22.4m 12 months earlier. Impairment charges offset higher sales to hit the bottom line for the last three months of 2012.

The company's fourth-quarter earnings per share, excluding special items, beat Wall Street forecasts.

"Snyder's-Lance reported Q4 2012 EPS of \$0.29 compared to consensus \$0.26 and our \$0.26 estimate – a solid quarter with strong synergy realisation evident, driving [the company] ever closer to its 10% target margin," Feeney added.

Press release follows:

Snyder's-Lance, Inc. Reports Results for Full Year 2012 -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

-- Reports 2012 full year earnings per diluted share of \$0.95 excluding special items

-- Reports 2012 full year earnings per diluted share of \$0.85 including special items

-- Completes merger integration work and Snack Factory acquisition during 2012

US: Snyder's-Lance 2013 outlook below Wall St estimates.

-- Positive outlook in 2013 for Net Revenue and Earnings per Share

CHARLOTTE, N.C., Feb. 12, 2013 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq: LNCE) today reported results for its fiscal year 2012. Net revenues for the year ended December 29, 2012, were \$1.62 billion, a decrease of 1.0% from prior year net revenues of \$1.64 billion. Net revenue, when adjusted for the impact of the independent business owner ("IBO") route system conversion, increased 2.2% year over year. The Company realized full year net income of \$66.1 million, excluding special items, or \$0.95 per diluted share, as compared to full year 2011 net income of \$47.8 million, excluding special items, or \$0.70 per diluted share. Net income, including special items, was \$59.1 million, or \$0.85 per diluted share, for the full year 2012 compared to \$38.3 million, or \$0.56 per diluted share, for 2011.

(Logo: <http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

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Comments from Management

"This was an important and successful year for Snyder's-Lance," commented David V. Singer, Chief Executive Officer. "During 2012, we grew our earnings more than 35%, excluding special items, and grew our sales by 2.2% when the impact of our IBO conversion is excluded. We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover®, Lance® and Cape Cod®; and we acquired Snack Factory®; and the fast growing **Pretzel Crisps®** brand. In 2012, we also invested in capacity and innovation capabilities while we improved margins on our non-branded items by discontinuing sales to certain customers who did not accept price increases. In the coming year, we'll continue to build on this solid foundation as we drive for results that grow our top line and expand our margins through innovation and continued strong execution in the marketplace. Our new R&D center will open in 2013, and it will support aggressive innovation goals for our future."

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Conference Call

Management will conduct a conference call and live webcast at 9:00am eastern time on Tuesday, February 12, 2013 to review the Company's full year results. The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website, www.snyderslance.com. In addition, the slide presentation will be available to download and print approximately 30 minutes before the webcast at www.snyderslance.com. To participate in the conference call, the dial-in number is (866) 814-7293 for U.S. callers or (702) 696-4943 for international callers. A continuous telephone replay of the call will be available between 1:00 pm on February 12 and midnight on February 19. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 93605983. Investors may also access a web-based replay of the conference call at www.snyderslance.com.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover®; Lance®; Cape Cod®; Pretzel Crisps®; Krunchers!®; Tom's®; Archway®; Jays®; Stella D'oro®; Eatsmart®; O-Ke-Doke®; Grande®; and Padrinos® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

Original source: Snyder's-Lance

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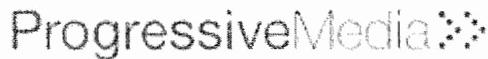
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Snyder's-Lance fiscal 2012 net income up 54.4%

Progressive Media - Company News

February 13, 2013 Wednesday

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Section: WATER & WASTE WATER MANAGEMENT; Savory Snacks

Length: 178 words

Highlight: US-based snack company Snyder's-Lance has reported that its net earnings increased by 54.4% to \$59.09m for the full-year 2012, compared to \$38.26m in 2011.

Body

For the year ended 29 December 2012, the company posted 1.2% decrease in net sales to \$1.62bn, compared to \$1.64bn in fiscal 2011.

Snyder's-Lance reported 65.3% decrease in net income to \$7.78m for the fourth quarter of 2012 , compared to \$22.43m for the same period in 2011.

For the quarter, the company posted 1.86% increase in net sales to \$419.83m, compared to \$412.13m in fiscal 2011.

Snyder's-Lance chief executive officer David Singer said that during 2012 the company has seen more than 35% in earnings, excluding special items, and rise in sales by 2.2% when the impact of its IBO conversion is excluded.

"We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover®, Lance® and Cape Cod®, and we acquired Snack Factory® and the fast growing Pretzel Crisps® brand," Singer added.

For the fiscal 2013, the company expects its net revenue and earnings per diluted share to increase by 10% - 12% and 22% - 32%, respectively.

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The Supply Side: Wal-Mart Supplier News Briefs

State Capital Newsfeed

Talk Business (Arkansas)

February 13, 2013 Wednesday 1:22 PM EST

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Body

Feb 13, 2013 (Talk Business:<http://www.talkbusiness.net> Delivered by Newstex)

A round-up of news notes concerning suppliers to the Wal-Mart community. 'The Supply Side' series appears courtesy of our content partner, The City Wire.

SNYDER'S-LANCE POSTS BIGGER PROFITS

Growth in its core branded items provided a boost for Snyder's-Lance Inc. in the fiscal year ended Dec. 29, 2012. Net income was \$59.5 million, equal to 86 cents per share. This compared with \$38.7 million, or 57 cents per share, in the previous fiscal year. Excluding special items, net income was \$66.1 million, which compared with \$47.8 million in the previous fiscal year.

Fiscal-year net revenues dipped 1% to \$1,619 million from \$1,635 million. When adjusted for the impact of the independent business owner route system conversion, net revenues increased 2%.

Snyder's-Lance began to implement its strategic plan in the 2012 fiscal year, said David V. Singer, CEO of Charlotte-based Snyder's-Lance.

'In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover, Lance and Cape Cod, and we acquired Snack Factory and the fast-growing **Pretzel Crisps** brand,' Singer said. 'In 2012, we also invested in capacity and innovation capabilities while we improved margins in our non-branded items by discontinuing sales to certain customers who did not accept price increases.'

For fiscal year 2013, Snyder's-Lance estimates its net revenue will rise 10% to 12% and that its earnings per diluted share will rise between 22% and 32%, excluding special items.

Also in fiscal year 2013, Singer plans to retire as CEO at an annual shareholders meeting on May 3. Carl E. Lee Jr., president and chief operating officer, will assume the CEO position at that time.

Snyder's Lance is a supplier at Wal-Mart Stores Inc. and has a sales office in Rogers.

NATIONAL BEEF SHEDS JOBS AFTER LOSS OF WAL-MART CONTRACT

National Beef Packing Co. announced plans to lay off 433 employees by April 13. The company said 150 layoffs will be at the Hummel's Wharf, Pa. location and 283 at the Moultrie, Ga. facility.

'National Beef was notified in October by one of its key customers (Wal-Mart Stores Inc.) that it would transition away from using National Beef as a supplier of case-ready beef,' the company said in a statement. 'Today, there are no plans to close the Hummel's Wharf or Moultrie facilities; however, they will begin to operate at reduced levels.'

'National Beef is working to bring additional business to each facility and to preserve the jobs, skills and experience of the National Beef team at each location,' the company said.

National Beef lost its contract with Wal-Mart in October. The company produced case-ready beef, hamburger and pork for Wal-Mart, the largest U.S. retailer. Company officials said they anticipated the change and had a contingency plan aimed at diversifying the company's customer base.

National Beef has operations in Liberal, Dodge City and Kansas City, Kan.; Brawley, Calif.; Hummel's Wharf, Pa.; Moultrie and St. Joseph, Mo. The company employs approximately 9,100 workers company-wide. National Beef

The Supply Side: Wal-Mart Supplier News Briefs

processes and markets fresh beef, case-ready beef, beef by-products and wet-blue leather for domestic and international markets.

National Beef is a competitor to Tyson Foods, who is a major supplier to Wal-Mart Stores Inc.

KRAFT FOODS TO EXPAND BEVERAGE PLANT

Kraft Foods is planning a \$40 million expansion project at its plant in Granite City, IL. The 660,000-sq.-ft. plant produces more than 100 varieties of Capri Sun and Kool-Aid ready-to-drink beverages.

The company's expansion project would include new construction, additional equipment and reconfiguring existing equipment; the work would add four new lines to fill pouches of Capri Sun.

Kraft is a major supplier to Wal-Mart with a local sales office in Rogers.

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Q4 2012 Lance, Inc. Earnings Conference Call - Final

FD (Fair Disclosure) Wire

February 12, 2013 Tuesday

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Body

Corporate Participants

* Mark Carter

Snyder's-Lance Inc - VP & IR Officer

* Dave Singer

Snyder's-Lance Inc - CEO

* Carl Lee

Snyder's-Lance Inc - President & COO

* Rick Puckett

Snyder's-Lance Inc - EVP & CFO

Conference Call Participants

* Akshay Jagdale

KeyBanc Capital Markets - Analyst

* Heather Jones

BB&T Capital Markets - Analyst

* Rohini Nair

Deutsche Bank - Analyst

* Jonathan Feeney

Janney Montgomery Scott - Analyst

* Amit Sharma

BMO Capital Markets - Analyst

* Michael Gallo

CL King & Associates - Analyst

Presentation

OPERATOR: Good morning, everyone. My name is Sarah, and I will be your conference operator today. At this time I would like to welcome you all to the fourth-quarter 2012 earnings conference call. All lines have been placed on mute to prevent any background noise. After the speakers' remarks, there will be a question-and-answer session.

(Operator Instructions)

Thank you. I would now like to turn the call over to our host, Mr. Mark Carter, Vice President and Investment Relations Officer. Sir, you may begin your conference.

MARK CARTER, VP & IR OFFICER, SNYDER'S-LANCE INC: Thank you very much, Sarah, and good morning, everyone. With me today are Dave Singer, our Chief Executive Officer; Carl Lee, our President and Chief Operating Officer; as well as Rick Puckett, our Executive Vice President and Chief Financial Officer. On today's call, Dave, Carl and Rick will discuss our full-year 2012 results, as well as estimates for the coming year. As a reminder, we are webcasting this conference call, including a supporting slide presentation on our website at www.SnydersLance.com. Before we begin I would like to point out that during today's presentation, management may make forward-looking statements about our Company's performance. Please refer to the Safe Harbor language included in each of our presentations. And I'll now turn the call over to Dave Singer, Chief Executive Officer, to begin management's comments.

DAVE SINGER, CEO, SNYDER'S-LANCE INC: Thanks, Mark. Good morning, everybody, and thanks for joining the call. We are really excited to review our results for 2012 and to provide our perspective on what we believe is a very bright future. 2012 was an important and successful year for Snyder's-Lance, and I'm really pleased with our progress. Carl and Rick will speak to some details, but before they do, I would like to make a few comments about some of the great things we accomplished last year. During 2012, we grew our earnings by more than 35%, excluding special items, when compared to 2011. While we also executed several clinical initiatives that were important to building our Company's foundation. One of our most important accomplishments last year was the completion of our merger integration and the transition of our DSD network to an independent business owner, or IBO model. This transition, which began in 2011, has put in place a national distribution network that helps drive market share for our products and allows us to reach more consumers than ever before. This integration was completed with amazing efficiency and in an incredibly short time. And everyone involved deserves our thanks and appreciation.

In 2012 we also rolled out and began to implement our strategic plan, which calls for a focus on overall quality and growth of our core brands, while reaching additional consumers and using our resources wisely. In line with this plan, and through the strength of our IBO-based DSD network, we delivered strong growth in the core branded items of Snyder's of Hanover, Lance, and Cape Cod as we executed changes in other parts of our business to improve margin. In 2012 we also acquired Snack Factory and the fast-growing **Pretzel Crisps** line, which became our fourth core brand. **Pretzel Crisps** has performed well in the short time we have owned this brand, and our outlook for 2013 is very good and in line with our expectations. There were numerous other achievements for Snyder's-Lance in 2012, including new marketing campaigns, infrastructure investments, margin improvement strategies and a number of distributor acquisitions to more completely fill in our DSD network coverage. Carl and Rick will speak to these little bit more in detail.

In the coming year, we'll continue to build on this solid foundation as we drive to deliver results that grow our top line and expand our margins. As we recently announced, I will step off the Board and retire from my role of CEO following our annual shareholders meeting in May of this year. It has been a great honor to be part of this Company for the past decade, and I am incredibly proud of the accomplishments made by the thousands of dedicated and hard-working employees that make all our success possible. Over the past decade, the Company's revenue and

earnings have tripled. And the average annual return to shareholders was more than 13%, about double the return for the S&P 500. More importantly, the hard work and great improvements made over this timeframe have positioned the Company for even faster growth, higher profitability and strong free cash flow, which will extend our track record of excellent returns for shareholders. Carl Lee, our current President and Chief Operating Officer, will become our new CEO in May. Carl has the experience and skill to lead our Company to new heights, and he has my full confidence and that of our Board of Directors. I feel confident that Snyder's-Lance is very well-positioned for continued growth and success for years to come, and I look forward to working with Carl on the other directors to ensure a seamless transition. Now Carl and Rick will provide some additional details about the progress we have made in 2012 and our outlook for 2013. Carl?

CARL LEE, PRESIDENT & COO, SNYDER'S-LANCE INC: Thank you, Dave. I want to take a few moments and share my appreciation for all Dave has accomplished during his time with our Company. Thanks to Dave's vision and drive, we have accomplished a lot over the last few years as we successfully merged two great businesses into a stronger national Company. We completed our integration on time, launched our strategic plan, acquired Snack Factory, and created significant shareholder value during 2012. Dave, I'm very grateful for your partnership, leadership and support over the past two years. Everyone at Snyder's-Lance is proud to have worked with you, and is thankful for all that you have done for our great organization. Now as we turn to 2012 and look at our strategic plan accomplishments, I would like to share some outlines.

Let's begin with our four core brands -- Snyder's Pretzels, Lance Sandwich Crackers, Cape Cod Kettle Chips, and Snack Factory **Pretzel Crisps**. Our brands grew faster than their respective categories in the fourth quarter to gain market share across the board. Not only did our team accomplish this for the quarter, they increased our market position during each of the quarters in 2012. We racked up sales and market share growth in varying competitive categories across all four brands by focusing our retail execution, innovative new products, and exciting consumer events. Our team expanded our margins on core, allied and private brands by changing our sales mix and price points. We exited our improved sales programs when they did not meet our margin hurdles. We walked away from a number of marginal programs this past year and have been working to replace that business with sales that deliver our margin goals.

Regarding our consumer activities, we launched a very successful movie tie-in for our Lance Sandwich Crackers, and we developed great new TV ads for Snyder's and Cape Cod. Each of which tested extremely well, and each will be used to drive consumer activation in 2013. Our innovative new products drove profitable growth as we worked to expand our consumer reach. Our Waffle Cut Cape Cod, Snyder's Braided Twist and Lance Cracker Creations helped us expand our franchise and revenue growth. Our R&D leaders were busy in 2012, overseeing the building of our new research and development center. It is due to open in the next 30 days and will support our aggressive innovation plans, helping us deliver category-expanding new products that deliver profitable incremental growth for our retailers. Our DSD leaders led our integration initiatives, delivering our conversion to an IBO system on time. We are pleased with our DSD execution, margins and growth potential. Not only did we complete our DSD integration in 2012, we acquired a number of DSD businesses to strengthen our network. We are committed to further expansion of our DSD system and the long-term growth potential it provides.

Our supply chain leaders consolidated our production and shipping locations to lower our cost of goods and raise our margins. Our supply chain associates were actively engaged in our Vision Stream of what we now call Fund the Future process, as they identified and executed a long list of projects to drive operating efficiency, expense reduction, quality, and service enhancements. Our team also executed a large number of major capital projects to support innovation, productivity, and packaging upgrades. In 2012 we also launched a number of capability programs to improve the tools our associates use on a daily basis. These include the new trait management software that enhances our promotion budgeting, planning and tracking to better manage our ROI. As well as enhance the P&Ls for zone and district sales leaders to help them better manage their local businesses, just to name a few. Finally, we improved support for all of our associates with organization development programs that support their personal development, advancement opportunities, and idea sharing. We saw a number of key promotions across the Company as we continue to develop our team internally, helping our people grow in order to support our Company growth.

Now taking a short view of Snack Factory, and an update there. As you know, we acquired Snack Factory and the fast-growing **Pretzel Crisps** brand in October. Along with a team of very talented and driven associates, **Pretzel Crisps** brings significant growth potential to Snyder's-Lance. **Pretzel Crisps** will help us push up our operating margins and our plans of reaching a 10% target. Our plans called for a quick integration of Snack Factory that we wanted to complete by the end of 2012. We also wanted to do this in a way that would be seamless to our customers. I am pleased to announce that this integration was completed on time and as planned. Looking forward, we are focused on leveraging the resources of Snyder's-Lance to support our **Pretzel Crisps** team, giving them plenty of flexibility to drive this very profitable business. Our goal in 2013 is to reach more first-time buyers, and to bring an even higher number of repeat customers into our franchise, and continue to grow the business.

Now looking forward to 2013. We already have some exciting, new innovative products ready for '13 that were developed through a cross-functional team effort of our marketing, R&D, sales and supply chain teams, all of which are very exciting and will help us reach our category growth targets. These teams have been busy creating a robust pipeline of new products for packaging and flavors that will enhance our current SKUs and allow us to win more consumers, while we delight our long-term consumers as well. Our sales teams are in the process of executing a number programs to expand our in-store merchandising, display and space allocation, with good success so far. Our marketing team has robust plans in place to support our core brands with exciting consumer events. The supply chain team will be leveraging our Fund the Future programs to drive further cost improvement, as well service and quality initiatives.

Now let me call out one of the biggest events we have for 2013. And that is our 100-year celebration and anniversary for our Lance Sandwich Crackers. In 2013, Lance Sandwich Crackers will celebrate its 100th year as the number one sandwich cracker. Our tagline -- The Goodness is Baked in -- makes a clear statement about our product quality, and we are excited to be celebrating 100 years of success. We will be introducing a very exciting new product called Xtra Fulls. It's a premium-filled sandwich cracker that gives our consumers more of what they like. You can see some of the graphics for our Lance 100-year anniversary on the online slide presentation, along with the image of our new Xtra Full product. In celebration of this great event, the Lance brand will see significant innovation this year as we also introduce new flavors of our Nekot cookies that we think will be a big hit. Now in conclusion. As Dave said, 2012 was a very important and successful year for Snyder's-Lance in many ways. We put a great foundation in place and accomplished a number of important steps in a short amount of time. I look forward to building on this success, and thank every one of our associates and partners for all of their support. I'll now turn it over to Rick for a closer look at the numbers.

RICK PUCKETT, EVP & CFO, SNYDER'S-LANCE INC: Thank you very much, Carl. And welcome, everybody, for our call. I want to refer you to the slide presentation that was posted this morning. And we will start on page 8 of that presentation, which shows the fourth-quarter revenue summary. And this does include, as footnoted, approximately \$27 million of Snack Factory revenue. Branded revenue was up versus last year by 10.6%. That is excluding the IBO impact. The IBO impact, by the way, will be with us until the second -- or the end of the second quarter of 2013. But we will continue to call that out as an adjustment. Excluding acquisitions, branded revenue was even with last year, with our core brands growing by 3%. Acquisitions contributed, as I had mentioned before, about \$27 million in the quarter. Private brands were improved over previous quarters, as Carl mentioned, but still down versus last year, which was, again, purposed as we exited the unprofitable business. We are now in the volume-rebuilding stage, with new volume be driven from new and existing customers.

On page 9, you will see the year-to-date or the full year of revenue summary. Excluding Snack Factory, branded revenue was up 4%, while core brands are up 7.5% for the year. Again, Snack Factory was in the fourth quarter only, so it contributed about \$27 million for the year. Private brands were again very close to our internal targets, with our deliberate reduction there, so we are quite happy with what we have done on private brands. The other category is impacted by a one-time bulk sale from 2011 of approximately \$5.5 million. So most of that variance is a result of a bulk sale that happened last year that did not occur in 2012. On page 10 you will see some key financial summary metrics for the fourth quarter. And I bring your attention to the gross margin of 34.7%. More than 34.1% last year. And approximately 170 basis points, or \$7 million, resulted in the negative impact year-over-year related to the IBO conversion. Continued favorable manufacturing efficiency is contributing significantly to the improved

gross margin for the quarter. The consolidation of facilities have been executed and are resulting in efficiencies over last year. In addition, our work on investing in capital improvements are starting to have a favorable impact. So all of the capital that we have been putting into place over the last year or so and will continue in 2013 are driving some improved margins and efficiencies.

I would also bring attention to the operating income percent at 7.9%, versus 6.2% last year. And I will make some comments relative to the full year as it relates to special items. But if we think about our operating margins, during this year we reported operating income of 5% in the first quarter, 6.3% in the second quarter, 7.8% in the third quarter, and now 7.9% in our final quarter. The integration savings have been fully realized as we expected and, quite honestly, as we talked at the last call. Our operating margins of 7.9% in the fourth quarter actually included 100 basis points of additional advertising spend. So that was the advertising that we had delayed from the third quarter as we repositioned our advertising and the messaging.

I also want to talk to you about the significant special items in the quarter. These related to three primary categories. For the year, these are largely offset by the gains on the sales of the routes that we completed in the year. The first category is impairment of trade unions. As we defined the value two years ago at the time of merger, we have not yet decided on where all the brands would be used. During this past year we have determined that some of the original Snyder's brands that were revalued would in fact be reduced in their use. And therefore we made an adjustment in their carrying value. The impairments of equipment is similar in that it's a result of making changes for optimizing our production as a result of merger and the closing of facilities. And then the third category is the M&A activity. So this includes the cost associated with the Snack Factory acquisition. And those are included in special items for the quarter.

Turning our attention to page 11. One highlight is that we are reporting diluted earnings per share of \$0.95, which is 135%, or 35.7% better than last year. Of the \$0.95, \$0.02 of that is related to Snack Factory. On page 12 is cash flow items. Our inventory levels were elevated this year-end, due primarily to the Snack Factory acquisition. Our days on hand, excluding Snack Factory, are still at 32 days, consistent with prior quarters. Our leverage ratio is around 3.0 at the end of the year. And we have an effective interest rate below 3%. So therefore, we will continue to use cash to fund growth through M&A and other investments, as we have stated in our strategy. On page 12 you'll see free cash flow at \$12.5 million, compared to \$53.8 million last year. The \$53.8 million in 2011 included the \$21 million tax refund, which did not re-occur in 2012. And also you can see on the capital expenditure line that we spent \$23 million more in CapEx this year versus last year.

Now we will turn to page 14 and talk briefly about our full-year estimates for 2013. We do expect net revenue to be 10% to 12% increase over 2012, which includes Snack Factory. If we exclude Snack Factory, we do estimate the increase to be approximately 4% to 6% on the organic growth expectation. We also estimate EPS to increase by 22% to 32%, with Snack Factory accounting for approximately 10% to 14%, and the remainder of the business accounting for a 12% to 18% increase. Commodities are committed to the first half, consistent with our normal practice. Capital spending estimates are at \$78 million to \$83 million, as we continue to invest in our manufacturing facilities. I will now turn it back over to Sarah for any questions.

Questions and Answers

OPERATOR: (Operator Instructions)

Heather Jones of BB&T Capital Markets.

CARL LEE: Good morning, Heather.

OPERATOR: Heather Jones, your line is open. Akshay Jagdale of KeyBanc.

AKSHAY JAGDALE, ANALYST, KEYBANC CAPITAL MARKETS: Can you hear me?

CARL LEE: We can, good morning, Akshay.

AKSHAY JAGDALE: Good morning. First of all, Rick, congratulations on the retirement. In terms of my questions, the first one is how do you bridge the gap between the 10% to 12% sales increase and 4% to 6% organic? Specifically, how much of the negative impact is the IBO conversion going to have? And what is the implied branded and core brand sales growth that you are assuming in those numbers? Thanks.

RICK PUCKETT: Yes, I think that we would not provide that at this point, Akshay. But to the 4% to 6% -- includes only around 2% in pricing. So most of that is volume growth driven by the innovation in ACV gains that we expect on our core brands. I don't have the core brand break-out at the moment, but we will be talking to that as we go through the year.

AKSHAY JAGDALE: Okay, that is helpful. And then just on this quarter, something that jumped out at me was your branded growth slowed down significantly. And it wasn't easy to get to that. But you mentioned in your comments that branded growth was flattish, I believe. What happened there? Because it was growing around 5% coming into the quarter, and it seems to have been flat if you exclude Snack Factory. So one, am I understanding that correctly? And two, why did that happen?

CARL LEE: Hi, Akshay, this is Carl. I'd love to work with you on the question. I think what I mentioned to you earlier was clearly, we gained market share in all four of our core brands. You know that we've got some very strong competitors, larger multinational companies that we compete within each of our four categories. And we were growing faster than them, and growing faster than the category during Q4, in order to achieve the market share gain I alluded to. And we drove that with some additional improvements in ACV. We drove it with some additional SKU stock per store. We also saw our base business perform quite well. And we were not relying a lot on non-promoted business in our growth. It was basically volume and base business growth. So overall, we performed quite well bench-marked against the category, and then in particular bench-marked against our competitors. Overall, I'm pleased with Q4's progress when you look at the dynamics of what was going on in the broader category and what was going on in the industry.

AKSHAY JAGDALE: So in other words, the weakness or the deceleration in sales is driven by category dynamics. Is that correct?

CARL LEE: I think it's not driven by category dynamics. I just think it's probably driven more by just what we see in the broader macroeconomics, and the marketplace in general.

AKSHAY JAGDALE: So you are looking --

CARL LEE: Rick mentioned that our core brands were up about 3% in the quarter, and the overall was softer and really the issue. We made some conscious decisions as we have been all year long in our allied brands to adjust pricing and promotional strategies, to build capacity and position us for better margins in the future. So that was another dynamic.

AKSHAY JAGDALE: So in your guidance for '13, you are assuming the current environment holds, correct? So in your sales guidance for your base business, you are assuming the current macroeconomic dynamics hold. But you will still be able to return to the growth rate that you had earlier in the year based on your innovation pipeline, pricing, et cetera. Is that correct?

CARL LEE: That sounds -- yes, with the target that Rick shared with you, we're very comfortable with those. And it will require us to grow a little faster, driven by some of the things that you mentioned.

AKSHAY JAGDALE: Okay, perfect. And then just two questions. One on commodity inflation. Can you remind us what the impact was in the quarter for 2012? And then what your expectations are next year? And then broadly, you have had Snack Factory not for too long. But just help me understand why warehouse-delivered product still makes sense, and doesn't say anything about your affinity towards DSD products going forward, as you think of acquisition pipeline. I mean, does it mean that -- because you bought Snack Factory -- does it mean you are not going to be doing DSD acquisitions? I don't think that's the answer, but I just want to get your sense on that. Thank you.

Q4 2012 Lance, Inc. Earnings Conference Call - Final

RICK PUCKETT: Akshay, I will take care of the commodity question and I will let Carl handle the Snack Factory question. As I mentioned on the last call, I think we expected somewhere around \$50 million to \$20 million of headwinds going into 2013. I think we're still comfortable with that. We don't necessarily break out the impact on a quarterly basis.

CARL LEE: And the question regarding Snack Factory and DSD. I think that that question can be answered pretty straightforward. I think when you take a look at Snack Factory, Snack Factory success is -- naturally the product itself is very unique (technical difficulty). But what has really helped beyond that is the placement in the deli. And the deli is not a friendly place to work with DSD. You know, based on the constraints of getting in there and getting out of there and dealing with the back-door hours that we deal with, getting over to the deli that serves it, in addition to the main aisles, is a little difficult. Obviously, servicing the deli with a direct sales force is very advantageous. So we are very committed to our DSD. We are looking for ways to continue to expand that. And we will continue to do work on acquisitions, we will continue to work on some enhancements to grow our DSD organization. We are very, very committed to our DSD, and will continue to grow and expand it. But we also see a beautiful opportunity over and above that to get to some areas in the store that, again, are not DSD-friendly. So we want to kind of divide and conquer, and use our direct sales force to go after some of these unique placements in the store. And then add to what we are already doing with our DSD system by covering that and continuing to expand our DSD. So we're going to leverage both organizations to grow our overall business.

AKSHAY JAGDALE: Perfect, thank you, I will get back in queue. Thanks.

CARL LEE: Thank you.

OPERATOR: Heather Jones of BB&T Capital Markets.

HEATHER JONES, ANALYST, BB&T CAPITAL MARKETS: Sorry about earlier. Congratulations, Carl, on the new position. And good luck, David, in your future endeavors.

DAVE SINGER: Thank you.

HEATHER JONES: I wanted to revisit the sales growth question. First on the branded side, I backed into roughly a \$4 million to \$5 million hit from I/O. Is that the I/O conversion? Did I do my math correctly?

RICK PUCKETT: It's about \$7 million, Heather.

HEATHER JONES: \$7 million in the branded section? Okay. So revisiting the question of the deceleration from Q3 to Q4. So it sounds like a combination of you are saying that the economic environment was more challenging, which you alluded to that on your Q3 call. But also a combination of -- did I understand that you walked away from some allied brand business?

CARL LEE: We did adjust our sales mix, we did adjust the business. So we didn't so much walk away from allied brand business. What we did was reposition it to be more profitable. So there was some adjustments in promotions, adjustments in price points, a little bit of adjustment in distribution, and those things to try to work on that. Private brands, however, we did intentionally walk away from some business that was not going to be able to meet our margin hurdles. I would say more adjustment on allied and some tough decisions on private brands led to what you were referring to.

HEATHER JONES: Okay. And you talked about the 4% to 6% organic sales growth outlook, only 2% price. So pretty substantial volume gain, which we didn't have in Q4. So I wanted to revisit Akshay's question. Do you have enough in the pipeline as far as new product development, et cetera, that causes you to be confident that you are going to achieve that, even if the economy doesn't improve from what you saw in Q4?

CARL LEE: I think we do have a strong sense of comfort level there. Because we are focused not only on the innovation you talked about. And the Xtra Fulls is something we are very excited about because it gives our consumers much more peanut butter, something that they have always asked for. So that's going to be a very new,

exciting new product. But beyond that, we continue to focus on what I call the blocking and tackling. The efforts to secure more space in our key customers is well underway. Working on our display coverage and our execution there is important. Working on the number of ACV coverage, working on the number of items that we stock per store. All of that is well underway as well. So it's going to be driven by, obviously, our advertising, our new products and our retail execution.

HEATHER JONES: You may have said this and I missed this. But how much are you projecting advertising up in 2013 versus '12?

RICK PUCKETT: Yes, we did not say that, Heather, so you did not miss it. It is increased over this year. We have not yet shared how much, but it is a 15% increase or so.

HEATHER JONES: Okay. And then finally, on the margin trends. Your guidance for 2013 looks like you are projecting EBIT margins somewhere in the 8% to 8.5% range. Should we expect margins in '13 to follow the normal seasonal pattern? Or I would assume, as you make progress towards achieving the double-digit goal, should we assume that those margins accelerate as we move through the year?

RICK PUCKETT: Yes, I think that you assume the latter. There are some start-up costs associated with these capital programs that are hitting earlier in the year, and then also impacting the full-year margins. Your 8% to 8.5% is a good number.

HEATHER JONES: Okay, thank you.

OPERATOR: Rohini Nair of Deutsche Bank.

ROHINI NAIR, ANALYST, DEUTSCHE BANK: Hi, thank you, good morning, everyone.

CARL LEE: Good morning.

ROHINI NAIR: I guess I wanted to go back to the question of productivity, because I had hoped we would get some more details today around the Company's initiatives. Especially given the commodity-cost environment, the fact that a lot of your peers are talking about how cost savings are becoming a part of their algorithms going forward. You have talked in general terms about Fund the Future, you know, how Vision Stream became Fund the Future, recently launched this year. Can you put that program into context for us? Can you let us know maybe how much that has been contributing to results? And what you expect to see out of that next year?

CARL LEE: I think that without going into a lot more detail, I think obviously it is an initiative led by our associates on the floor of our plants. And if anyone knows how to operate more efficiently, how to look for improvements in the way we manage our equipment, the timing that we run our products and things like that, it's our very valuable and very talented front-line folks. And by really adding some energy around and process around them sharing their ideas, us listening to them, putting together a plan jointly that goes after it, we have seen significant productivity savings, overall cost savings, and initiatives that enhanced our products throughout 2012. We saw some very good savings drop to the bottom line in '12. Some of those initiatives are being implemented today. And we will continue to fund some savings in '13, and they will continue to go forward. So the savings have indeed been significant, and they are indeed helping us offset some of our investment in marketing that we are adding this year. It is also helping us offset a little bit of the commodity pressures that we've got. And we are just enthused about the progress that our team is making, and just continue to encourage them to do what they have done so successfully, really, over the last 18 months.

ROHINI NAIR: Okay, thank you for that. And going back to Heather's point about margins in 2013 that you are targeting around 8% to 8.5%. Before the **Pretzel Crisps** acquisition, I think you had pointed to similar types of numbers. In a way, I thought that **Pretzel Crisps** would be a way to accelerate it. But it feels a bit like maybe you're pushing that further out now. Is there a reason that maybe you are being a little bit more cautious on that front?

RICK PUCKETT: I don't think that we're pushing it out any further. We never really said it was going to be 10% by 2014 or 2013. We do expect that the investments that we have made and will be making, as it relates to the capital, will start to return some efficiencies as well. And in 2013, as I mentioned a few minutes ago, there are pretty significant start-up costs associated with these large capital projects. When you put in an entire line, there is quite a few hours spent in getting the product through and getting it right and having the right quality. We are incurring those costs as an expense in our P&L. So I think what you'll find is that 2013 will be a year where we are positioned to exponentially grow operating margins in the future.

ROHINI NAIR: Great, thank you so much. I will pass it on.

OPERATOR: Jonathan Feeney of Janney.

JONATHAN FEENEY, ANALYST, JANNEY MONTGOMERY SCOTT: Thanks very much. And Dave, let me add my congratulations. I remember maybe seven or eight years ago being in a conference with you in Florida, sort of laying out these plans to enhance margin through more distribution efficiencies. And it's really come a long way, and it's a great credit. So congratulations.

DAVE SINGER: Thanks, Jonathan.

JONATHAN FEENEY: I just have one question for Rick. I would love to understand, maybe looking at the capital expenditure. What maybe is a good maintenance run rate of capital expenditure for this business? And to the extent that next year is above that level, which I understand it is, could you talk about the payback period that you sort of look at on these productivity initiatives? And how we can expect those to flow into earnings in years ahead, just philosophically? Thank you.

RICK PUCKETT: Yes. I mean, our maintenance capital, we estimate around \$30 million to \$35 million, which is similar to our depreciation. The rest of that is amortization of a lot of intangibles. So it's probably closer to \$35 million than \$30 million. When we look at a capital expenditure -- and these are large capital expenditures -- they are \$20 million each, and north of that, right? So it's a pretty significant investment in our business. And our hurdle rates are at least a 12% internal rate return on those. Which kind of gives you a payback of somewhere around three or four years, or something like that. We expect that after we go through the start-up process, that we will start to see cash flow being generated from those investments. And we are making a lot of those investments in our Charlotte facility, we are making them in other facilities as well. In our Cape Cod facility up in Hyannis. So we will continue to make those investments to enhance our quality and to enhance our efficiencies going forward. We feel that we are in a place which, coming out of 2013, will be closer to that. So in future years, our CapEx is probably going to be a little bit lower, and a little bit more like the 4% or so of revenue that we see our peer group in.

JONATHAN FEENEY: Okay, thank you very much.

OPERATOR: (Operator Instructions)

Amit Sharma of BMO Capital Markets.

AMIT SHARMA, ANALYST, BMO CAPITAL MARKETS: Hi, good morning, everyone.

CARL LEE: Good morning.

AMIT SHARMA: Carl, just a question on the non-branded portion of the portfolio. As we look at 2013, should we assume that that portfolio is stabilized to the point where we won't see a year-over-year decline? Or are you still going through the process of culling out some of the unprofitable business?

CARL LEE: Most of the heavy lifting is behind us. So we are beginning to see some stabilization in 2013. We are going to continue to manage that business to really protect the franchise, but at the same time, make sure that we kind of maximize our margins. So we will see the top line improve. And we will continue to see some additional ways to try to make sure we just kind of leverage that business to not only grow, but to support our core brands as well.

AMIT SHARMA: Got it. And as I calculate margins on that business, I have like 3% to 4% margin in that business. Should I expect that to increase, given all the portfolio realignment that you are doing in that business? Maybe 50-, 60-basis point increase in operating margin from that business?

RICK PUCKETT: Yes. We obviously are not talking about margins in our specific businesses. But if you look at the peer group on private brands, it is somewhere between some 7% and 9% operating margins. And we believe that we are producing and running our businesses to be consistent with that.

AMIT SHARMA: Okay. So 7% to 9% for the private label business, and then probably lower margins for partner brands, is that right?

RICK PUCKETT: Well, partner brands is simply a distribution model, right? So what you have there is what you might see in other distributors, which could be anywhere from 2% to 5%, depending on the distributor.

AMIT SHARMA: Got it. And then, just a clarification. Carl, in response to an earlier question, you were saying that some of the growth in acquisition could be -- through acquisition -- could be in the areas where they are traditionally difficult to service by DSD. As we look at going forward, is acquisition going to be driven by a desire to become bigger in your core categories? Or does the Snack Factory acquisition give you the flexibility of maybe going outside of the current portfolio, and maybe leverage your expertise in DSD?

CARL LEE: I think it's a little bit more the latter. I think the key for us is, we are very in-tune to building distribution. We clearly see distribution as a driver for our overall business. And we see it as a way to really support our brands. But we also come to the realization that while we are committed to our DSD distribution -- we will continue to expand it, continue to grow, continue to look for acquisitions in distribution -- we have to realize that not everything is going to be able to go through that system to hit the store shelves as we see today. So it does create some flexibility for us to have a world-class DSD system, to continue to bring new product innovation through in our new brands that we acquire or build. It also gives us the added flexibility to fill in where DSD cannot get, with our direct sales organization. So we see it as an incremental opportunity for us over and above DSD, to have an item like Snack Factory, and the flexibility to have a distribution in place to support it and other brands that we may work with over time.

AMIT SHARMA: Great, I appreciate it, thank you very much.

OPERATOR: Michael Gallo of CL King.

MICHAEL GALLO, ANALYST, CL KING & ASSOCIATES: Hi, good morning, and congratulations to David on his retirement.

DAVE SINGER: Thank you.

MICHAEL GALLO: My question is just on the private brands business. Should we expect to see some moderation in the declines there in 2013? At this point, is the portfolio where you want it to be in terms of being able to get adequate pricing and margins? Or do you expect we will see further rationalization this year? Thank you.

CARL LEE: The rationalization for the most part is behind us. We went through a lot of heavy lifting throughout 2012. It was a pretty deep dive on where we are making money and how we could improve it. And so most of the rationalization is behind us. And we will just continue to watch commodity costs, input costs, and then if we have to make future adjustments, we will. But overall, we're in pretty good shape as we look into 2013, based on everything we know today with input costs and commodities.

MICHAEL GALLO: Thank you.

MARK CARTER: Hello?

OPERATOR: Akshay Jagdale of KeyBanc.

AKSHAY JAGDALE: Thanks for taking the of follow-up. This question is more philosophical or longer-term, looking at acquisitions. The way I look at your business -- I want to make sure I'm not misunderstanding the opportunity. But when I look at your business from our perspective, I see that there is a lot of room on the manufacturing side in terms of utilization, as evidenced by the volume you have flowing through on private label, as well as co-manufacturing. And I also similarly see a lot of room to expand through your DSD network. Because, from what I understand, there is a lot more room for more product to flow through each of the trucks that operate in your DSD network. So if that is the right understanding, I would also assume that if you were to acquire a DSD brand, it would tend to be more accretive than, let's say, a warehouse product. So am I thinking of this, generally speaking, correctly? I mean, I know you can't go out there and buy something that is not available, right? You have to be opportunistic, and that seems to be what you did with Snack Factory. But is that really where the leverage is, the way I understand it? Or am I understanding your business model incorrectly?

CARL LEE: I think your overall understanding of our business model is correct. I think that when we do look for targets, clearly the number one criteria is that it will be accretive. And I think what we have been able to demonstrate is that Snack Factory is accretive. And to your point, we can always expand our DSD system and put more products through that, so that could also be a way to leverage that infrastructure and add additional margin. I think that we have really opened some unique flexibility to be able to fully leverage a DSD system works really good. And then use a direct model to fill in where we can get with DSD. So I would expect anything that we can do to expand either one of those distribution systems would be to our advantage.

AKSHAY JAGDALE: Okay. And just to that end from a financial standpoint, can you remind us where your leverage is today? Where you expect it to go post this acquisition? How quickly it could get leveraged down? And in the short-term, if you still have flexibility and the appetite to continue to expand if the right thing comes along?

RICK PUCKETT: Yes. Our leverage is around 3.0 right now, Akshay. And we do believe we have capacity to do -- to be able to react to things, or proactively look at things today. And to Carl's point, we will look at things that are accretive right away, as we have done in the past. So we do believe we have that capacity. As far as paying down our debts, that is where all of our free cash flow goes right now. That plus the dividend. You know, that is our strategy. We expect to drive that down much more in line with 2 to 2.5 times leverage throughout this year, probably closer to 2.5, as we pay down that debt. But the industry average right now is probably around 3.0. We are comfortable right where we are. We would not be comfortable too much higher than that. So our goal would be to reduce that leverage over time.

AKSHAY JAGDALE: Okay, thank you. I will pass it on.

OPERATOR: There are no further questions at this time. I turn the call back over to Mr. Dave Singer, Chief Executive Officer, for closing remarks.

DAVE SINGER: Sarah, thank you very much, and thanks, everybody, for joining the call. Appreciate all the support, and really look forward to watching Carl and management team and the organization go forward. It's been a great decade involved with the Company, a great eight years as CEO. And I am really proud of what has been accomplished, and incredibly optimistic that the foundation is built to really continue to drive this business going forward. So thanks for everything, and I look forward to the future. Thank you.

OPERATOR: This concludes today's conference call. You may now disconnect.

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Body

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OVERVIEW

LNCE reported 2012 diluted EPS of \$0.95. Expects 2013 net revenue to be up 10-12% over 2012, including Snack Factory.

FINANCIAL DATA

1. 2012 diluted EPS = \$0.95. 2. 4Q12 GM = 34.7%. 3. 2013 net revenue guidance (including Snack Factory) = up 10-12% over 2012. 4. 2013 net revenue guidance (excluding Snack Factory) = up approx. 4-6% on organic growth expectations.

PRESENTATION SUMMARY -

2012 Review (D.S.) 1. Overview: 1. Grew earnings by more than 35%, excluding special items vs. 2011. 2. Executed several critical initiatives that were important to building foundation. 2. Accomplishments: 1. Completed merger integration and transition of DSD network to independent business owner (IBO model). 1. Transition which began in 2011, put in place national distribution network that helps drive market share for products and allows to reach more consumers than ever before. 2. Integration completed with amazing efficiency and short-time. 2. Rolled out and began to implement strategic plan. 1. Focus on overall quality and growth of core brand while reaching additional consumers and using resources wisely. 3. In line with this plan, and through strength of IBO based DSD network, delivered strong growth in core branded items of Snyder's of Hanover, Lance and Cape Cod as Co. executed changes in other parts of business to improve margins. 4. Acquired Snack Factory and fast growing **Pretzel Crisps** line. 1. **Pretzel Crisps** became fourth core brand. 1. Performed well in short-time. 2. 2013 outlook is good and in line with expectations. 5. Other achievements, including: 1. New marketing campaigns. 2. Infrastructure investments. 3. Margin improvement strategies. 4. Number of distributor acquisitions to more completely fill in DSD network coverage. 6. In coming year, will continue to build on this solid foundation as Co. drives to deliver results

that grow top line and expand margins. 3. Management Update: 1. David Singer will step-off the Board and retiree from role of CEO following Annual Shareholders Meeting in May of this year. 1. Over past decade: 1. Revenue and earnings have tripled. 2. Avg. annual return to shareholder was more than 13%; about double the return for S&P 500. 2. Hard work and great improvements made over this timeframe, positioned Co. for even faster growth, higher profitability and strong free cash flow, which will extend track record of excellent returns for shareholders. 2. Carl Lee current President and COO will become new CEO in May.

2012 Operational Review (C.L.) 1. David Singer Accomplishments: 1. Successfully merged two great businesses into stronger national company. 1. Completed integration on time. 2. Launched strategic plan. 3. Acquired Snack Factory. 4. Created significant shareholder value during 2012. 2. Brands: 1. Four core brands: 1. Pretzel. 2. Lance Sandwich Cracker. 3. Cape Cod Potato Chips. 4. Snack Factory **Pretzel Crisps**. 2. Grew faster in respective categories in 4Q to gain market share across board. 1. Not only did team accomplish this for qtr., increased market share position during each of quarters in 2012. 3. Raked up sales and market share growth in competitive categories across all four brands by focusing on: 1. Retail execution. 2. Innovated new products. 3. Exciting consumer events. 4. Expanded margins on core allied and private brands by changing: 1. Sales mix. 2. Price points. 5. Exited or improved sales programs when they did not meet margin hurdles. 6. Walked away from number of marginal programs this past year. 1. Working to replace this business with sales that deliver margin goals. 3. Consumer Activities: 1. Launched great movie tie-in Lance Sandwich Crackers. 2. Developed new TV ads for Snyder's and Cape Cod. 1. Each of which contested extremely well. 2. Each will be used to drive consumer activation in 2013. 3. Innovative new products drove profitable growth as Co. works to expand consumer reach. 1. Waffle Cut Cape Cod, Snyder's Ready Twist and Lance Cracker Creations helps expand franchise and revenue growth. 4. R&D Center: 1. R&D leaders were busy overseeing building of new R&D center. 2. Due to open in next 30 days. 3. Will support aggressive innovation plans, helping to deliver category expanding new products to deliver profitable incremental growth for retailers. 5. DSD: 1. Lead integration initiatives delivering conversion to IBO system on time. 2. Pleased with: 1. DSD execution. 2. Margins. 3. Growth potential. 3. Not only did Co. completes DSD integration in 2012 required number of DSD businesses to strengthen network. 4. Committed to further expansion of DSD system and long-term growth potential it provides. 6. Supply Chain: 1. Leaders consolidated production in shipping locations to: 1. Lower cost of goods. 2. Raise margins. 2. Associates were actively engaged in vision stream, as they identified and executed long list of projects to drive: 1. Operating efficiency. 2. Expense reduction. 3. Quality and service enhancements. 7. Other Details: 1. Executed large number of major capital projects to support: 1. Innovation. 2. Productivity. 3. Packaging upgrades. 2. Launched number of capability programs to improve tools associate use on a daily basis; includes new trade management software that enhances: 1. Current promotion budgeting, planning, and tracking to better manage ROI. 2. P&L for zone and district sales leaders to help them better manage their local businesses. 3. Improved support for all of associates with organization development programs that supports: 1. Personal developments. 2. Advancement opportunities. 3. Idea sharing. 4. Saw number of key promotions across as Co. continues to develop team internally, helping people grow in order to support Co. growth. 8. Snack Factory: 1. Acquired Snack Factory and fast growing **Pretzel Crisps** brand in Oct. 2. **Pretzel Crisps**: 1. Bring significant revenue growth potential. 2. Will help push up operating margins and plans of reaching 10% target. 3. Plans call for quick integration of Snack Factory that Co. wanted to complete by 2012-end. 1. Wanted to be seamless to customers. 4. Integration was completed on time and as planned. 5. Looking forward, focused on leveraging resources to support **Pretzel Crisps** giving them plenty of flexibility to drive this profitable business. 1. 2013 goal is to reach more first time buyers and to bring even higher number of repeat customers into franchise and keep continue to grow business. 9. 2013 Outlook: 1. Already have some exciting new and innovative products ready that were developed through cross functional team effort of marketing, R&D, sales and supply chain. 1. Will help to reach category growth targets. 2. Busy creating robust pipeline of new products for packaging and flavors that will enhance current SKUs, allow to win more consumers while Co. delights long-term consumers as well. 2. Sales teams are in process of executing number of programs to expand: 1. In-store merchandizing. 2. Display and safety allocation with good success so far. 3. Marketing team as robust plans in place to support core brands with exciting consumer events. 4. Supply chain teams will be leveraging fund to future programs to drive: 1. Further cost improvement. 2. Service and quality initiatives. 5. 100-years celebration and anniversary for Lance Sandwich Crackers. 1. Reintroducing new product called XTRA FULLS, premium filled sandwich cracker. 6. Sees significant innovation this year as Co. introduces new flavors of Nekot cookies.

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Financials (R.P.) 1. Revenues: 1. 4Q12: 1. Includes approx. \$27m of Snack Factory revenue. 2. Branded, up vs. last year by 10.6%, excluding IBO impact. 1. IBO impact will be there until 2Q13-end; will continue to call that out as adjustment. 2. Excluding acquisitions, even with last year with core brands scoring by 3%. 3. Acquisitions contributed about \$27m. 3. Private brands were improved over previous quarters, but still down vs. last year, which was purposed as Co. exited unprofitable business. 1. In volume rebuilding stage with new volumes being driven from new and existing customers. 2. Full-Year: 1. Excluding Snack Factory: 1. Branded up 4%. 2. Core brands up 7.5% 2. Snack Factory was in 4Q12 only, contributed about \$27m for year. 3. Private brands close to internal targets with [deliberate reduction]. 4. Other category is impacted by one-time bulk sale from 2011 of approx. \$5.5m. 1. Most of this variance is result of bulk sales that happened last year, but did not occur in 2012. 2. GM: 1. 4Q12, 34.7%. 1. More than 34.1% last year. 2. Approx. 170 BP or \$7m resulted in negative impact YoverY related to IBO conversion. 3. Continued favorable manufacturing efficiency is contributing significantly to improved GM for qtr. 4. Consolidations of facilities has been executing. 1. Resulting in efficiencies over last year. 5. Work on investing and capital improvements are starting to have favorable impact. 6. All of capital that Co. has been putting in place over last year, will continue into 2013 are driving some improved margins and efficiencies. 3. Operating Income: 1. 4Q12, 7.9% vs. 6.2% in 4Q11. 2. Thinking about operating margin, during this year recorded operating income of: 1. 5% in 3Q. 2. 6.3% in 2Q. 3. 7.8% in 3Q. 4. 7.9% in 4Q. 3. Integration savings have been fully realized as Co. factored in. 4. Included 100 BP of additional advertising expense. 1. Advertising that Co. had delayed from 3Q as it repositioned advertising and messaging. 4. 4Q12 Significant Special Items: 1. For year, these are likely offset by gains on sale of routes completed in year. 2. (inaudible). 1. As Co. defined value two years ago at time of merger, has not yet decided on where all brands would be used. 2. During this past year, determined that some of original Snyder's brand that were revalued would in fact be reduced in their use. 1. Made an adjustment in carrying values. 3. Impairment of equipment is similar. 1. Result of making changes for optimizing production due to merger and closing of facilities. 4. M&A activity: 1. Includes cost associated with Snack Factory acquisitions. 2. Included in special items. 5. 2012 EPS: 1. Diluted EPS \$0.95. 1. 35.7% better than 2011. 2. Off \$0.95, \$0.02 was related to Snack Factory. 6. Cash Flow: 1. Inventory levels were elevated at year-end. 1. Due primarily to Snack Factory acquisition. 2. Days on hand, excluding Snack Factory, is still at 32. 1. Consistent with prior quarters. 3. Leverage ratio around 3.0 at year-end. 4. Effective interest rate below 3%. 5. Will continue to use cash to fund growth through M&A and other investments. 6. 2012 free cash flow \$12.5m vs. \$53.8m in 2011. 1. \$53.8m in 2011 included \$21m tax refunds which did not reoccur in 2012. 7. Spend \$23m more in CapEx this year vs. last year. 7. 2013 Guidance: 1. Net revenue: 1. Including Snack Factory, up 10-12% over 2012. 2. Excluding Snack Factory, up approx. 4-6% on organic growth expectations. 2. EPS up 22-32%. 1. Snack Factory accounting for approx. 10-14%. 2. Remainder of business accounting for 12-18% increase. 3. Commodities are committed to 1H, consistent with normal practice. 4. CapEx \$78-83m. 1. Continues to invest in manufacturing facilities.

QUESTIONS AND ANSWERS

OPERATOR: (Operator Instructions)

Heather Jones of BB&T Capital Markets.

CARL LEE, LANCE INC - PRESIDENT & COO, SNYDER'S: Good morning, Heather.

OPERATOR: Heather Jones, your line is open. Akshay Jagdale of KeyBanc.

AKSHAY JAGDALE, ANALYST, KEYBANC CAPITAL MARKETS: Can you hear me?

CARL LEE: We can, good morning, Akshay.

AKSHAY JAGDALE: Good morning. First of all, Rick, congratulations on the retirement. In terms of my questions, the first one is how do you bridge the gap between the 10% to 12% sales increase and 4% to 6% organic? Specifically, how much of the negative impact is the IBO conversion going to have? And what is the implied branded and core brand sales growth that you are assuming in those numbers? Thanks.

RICK PUCKETT, LANCE INC - EVP & CFO, SNYDER'S: Yes, I think that we would not provide that at this point, Akshay. But to the 4% to 6% -- includes only around 2% in pricing. So most of that is volume growth driven by the

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innovation in ACV gains that we expect on our core brands. I don't have the core brand break-out at the moment, but we will be talking to that as we go through the year.

AKSHAY JAGDALE: Okay, that is helpful. And then just on this quarter, something that jumped out at me was your branded growth slowed down significantly. And it wasn't easy to get to that. But you mentioned in your comments that branded growth was flattish, I believe. What happened there? Because it was growing around 5% coming into the quarter, and it seems to have been flat if you exclude Snack Factory. So one, am I understanding that correctly? And two, why did that happen?

CARL LEE: Hi, Akshay, this is Carl. I'd love to work with you on the question. I think what I mentioned to you earlier was clearly, we gained market share in all four of our core brands. You know that we've got some very strong competitors, larger multinational companies that we compete within each of our four categories. And we were growing faster than them, and growing faster than the category during Q4, in order to achieve the market share gain I alluded to. And we drove that with some additional improvements in ACV. We drove it with some additional SKU stock per store. We also saw our base business perform quite well. And we were not relying a lot on non-promoted business in our growth. It was basically volume and base business growth. So overall, we performed quite well bench-marked against the category, and then in particular bench-marked against our competitors. Overall, I'm pleased with Q4's progress when you look at the dynamics of what was going on in the broader category and what was going on in the industry.

AKSHAY JAGDALE: So in other words, the weakness or the deceleration in sales is driven by category dynamics. Is that correct?

CARL LEE: I think it's not driven by category dynamics. I just think it's probably driven more by just what we see in the broader macroeconomics, and the marketplace in general.

AKSHAY JAGDALE: So you are looking --

CARL LEE: Rick mentioned that our core brands were up about 3% in the quarter, and the overall was softer and really the issue. We made some conscious decisions as we have been all year long in our allied brands to adjust pricing and promotional strategies, to build capacity and position us for better margins in the future. So that was another dynamic.

AKSHAY JAGDALE: So in your guidance for '13, you are assuming the current environment holds, correct? So in your sales guidance for your base business, you are assuming the current macroeconomic dynamics hold. But you will still be able to return to the growth rate that you had earlier in the year based on your innovation pipeline, pricing, et cetera. Is that correct?

CARL LEE: That sounds -- yes, with the target that Rick shared with you, we're very comfortable with those. And it will require us to grow a little faster, driven by some of the things that you mentioned.

AKSHAY JAGDALE: Okay, perfect. And then just two questions. One on commodity inflation. Can you remind us what the impact was in the quarter for 2012? And then what your expectations are next year? And then broadly, you have had Snack Factory not for too long. But just help me understand why warehouse-delivered product still makes sense, and doesn't say anything about your affinity towards DSD products going forward, as you think of acquisition pipeline. I mean, does it mean that -- because you bought Snack Factory -- does it mean you are not going to be doing DSD acquisitions? I don't think that's the answer, but I just want to get your sense on that. Thank you.

RICK PUCKETT: Akshay, I will take care of the commodity question and I will let Carl handle the Snack Factory question. As I mentioned on the last call, I think we expected somewhere around \$50 million to \$20 million of headwinds going into 2013. I think we're still comfortable with that. We don't necessarily break out the impact on a quarterly basis.

CARL LEE: And the question regarding Snack Factory and DSD. I think that that question can be answered pretty straightforward. I think when you take a look at Snack Factory, Snack Factory success is -- naturally the product

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itself is very unique (technical difficulty). But what has really helped beyond that is the placement in the deli. And the deli is not a friendly place to work with DSD. You know, based on the constraints of getting in there and getting out of there and dealing with the back-door hours that we deal with, getting over to the deli that serves it, in addition to the main aisles, is a little difficult. Obviously, servicing the deli with a direct sales force is very advantageous. So we are very committed to our DSD. We are looking for ways to continue to expand that. And we will continue to do work on acquisitions, we will continue to work on some enhancements to grow our DSD organization. We are very, very committed to our DSD, and will continue to grow and expand it. But we also see a beautiful opportunity over and above that to get to some areas in the store that, again, are not DSD-friendly. So we want to kind of divide and conquer, and use our direct sales force to go after some of these unique placements in the store. And then add to what we are already doing with our DSD system by covering that and continuing to expand our DSD. So we're going to leverage both organizations to grow our overall business.

AKSHAY JAGDALE: Perfect, thank you, I will get back in queue. Thanks.

CARL LEE: Thank you.

OPERATOR: Heather Jones of BB&T Capital Markets.

HEATHER JONES, ANALYST, BB&T CAPITAL MARKETS: Sorry about earlier. Congratulations, Carl, on the new position. And good luck, David, in your future endeavors.

DAVE SINGER, LANCE INC - CEO, SNYDER'S: Thank you.

HEATHER JONES: I wanted to revisit the sales growth question. First on the branded side, I backed into roughly a \$4 million to \$5 million hit from I/O. Is that the I/O conversion? Did I do my math correctly?

RICK PUCKETT: It's about \$7 million, Heather.

HEATHER JONES: \$7 million in the branded section? Okay. So revisiting the question of the deceleration from Q3 to Q4. So it sounds like a combination of you are saying that the economic environment was more challenging, which you alluded to that on your Q3 call. But also a combination of -- did I understand that you walked away from some allied brand business?

CARL LEE: We did adjust our sales mix, we did adjust the business. So we didn't so much walk away from allied brand business. What we did was reposition it to be more profitable. So there was some adjustments in promotions, adjustments in price points, a little bit of adjustment in distribution, and those things to try to work on that. Private brands, however, we did intentionally walk away from some business that was not going to be able to meet our margin hurdles. I would say more adjustment on allied and some tough decisions on private brands led to what you were referring to.

HEATHER JONES: Okay. And you talked about the 4% to 6% organic sales growth outlook, only 2% price. So pretty substantial volume gain, which we didn't have in Q4. So I wanted to revisit Akshay's question. Do you have enough in the pipeline as far as new product development, et cetera, that causes you to be confident that you are going to achieve that, even if the economy doesn't improve from what you saw in Q4?

CARL LEE: I think we do have a strong sense of comfort level there. Because we are focused not only on the innovation you talked about. And the Xtra Fulls is something we are very excited about because it gives our consumers much more peanut butter, something that they have always asked for. So that's going to be a very new, exciting new product. But beyond that, we continue to focus on what I call the blocking and tackling. The efforts to secure more space in our key customers is well underway. Working on our display coverage and our execution there is important. Working on the number of ACV coverage, working on the number of items that we stock per store. All of that is well underway as well. So it's going to be driven by, obviously, our advertising, our new products and our retail execution.

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HEATHER JONES: You may have said this and I missed this. But how much are you projecting advertising up in 2013 versus '12?

RICK PUCKETT: Yes, we did not say that, Heather, so you did not miss it. It is increased over this year. We have not yet shared how much, but it is a 15% increase or so.

HEATHER JONES: Okay. And then finally, on the margin trends. Your guidance for 2013 looks like you are projecting EBIT margins somewhere in the 8% to 8.5% range. Should we expect margins in '13 to follow the normal seasonal pattern? Or I would assume, as you make progress towards achieving the double-digit goal, should we assume that those margins accelerate as we move through the year?

RICK PUCKETT: Yes, I think that you assume the latter. There are some start-up costs associated with these capital programs that are hitting earlier in the year, and then also impacting the full-year margins. Your 8% to 8.5% is a good number.

HEATHER JONES: Okay, thank you.

OPERATOR: Rohini Nair of Deutsche Bank.

ROHINI NAIR, ANALYST, DEUTSCHE BANK: Hi, thank you, good morning, everyone.

CARL LEE: Good morning.

ROHINI NAIR: I guess I wanted to go back to the question of productivity, because I had hoped we would get some more details today around the Company's initiatives. Especially given the commodity-cost environment, the fact that a lot of your peers are talking about how cost savings are becoming a part of their algorithms going forward. You have talked in general terms about Fund the Future, you know, how Vision Stream became Fund the Future, recently launched this year. Can you put that program into context for us? Can you let us know maybe how much that has been contributing to results? And what you expect to see out of that next year?

CARL LEE: I think that without going into a lot more detail, I think obviously it is an initiative led by our associates on the floor of our plants. And if anyone knows how to operate more efficiently, how to look for improvements in the way we manage our equipment, the timing that we run our products and things like that, it's our very valuable and very talented front-line folks. And by really adding some energy around and process around them sharing there ideas, us listening to them, putting together a plan jointly that goes after it, we have seen significant productivity savings, overall cost savings, and initiatives that enhanced our products throughout 2012. We saw some very good savings drop to the bottom line in '12. Some of those initiatives are being implemented today. And we will continue to fund some savings in '13, and they will continue to go forward. So the savings have indeed been significant, and they are indeed helping us offset some of our investment in marketing that we are adding this year. It is also helping us offset a little bit of the commodity pressures that we've got. And we are just enthused about the progress that our team is making, and just continue to encourage them to do what they have done so successfully, really, over the last 18 months.

ROHINI NAIR: Okay, thank you for that. And going back to Heather's point about margins in 2013 that you are targeting around 8% to 8.5%. Before the **Pretzel Crisps** acquisition, I think you had pointed to similar types of numbers. In a way, I thought that **Pretzel Crisps** would be a way to accelerate it. But it feels a bit like maybe you're pushing that further out now. Is there a reason that maybe you are being a little bit more cautious on that front?

RICK PUCKETT: I don't think that we're pushing it out any further. We never really said it was going to be 10% by 2014 or 2013. We do expect that the investments that we have made and will be making, as it relates to the capital, will start to return some efficiencies as well. And in 2013, as I mentioned a few minutes ago, there are pretty significant start-up costs associated with these large capital projects. When you put in an entire line, there is quite a few hours spent in getting the product through and getting it right and having the right quality. We are incurring those costs as an expense in our P&L. So I think what you'll find is that 2013 will be a year where we are positioned to exponentially grow operating margins in the future.

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ROHINI NAIR: Great, thank you so much. I will pass it on.

OPERATOR: Jonathan Feeney of Janney.

JONATHAN FEENEY, ANALYST, JANNEY MONTGOMERY SCOTT: Thanks very much. And Dave, let me add my congratulations. I remember maybe seven or eight years ago being in a conference with you in Florida, sort of laying out these plans to enhance margin through more distribution efficiencies. And it's really come a long way, and it's a great credit. So congratulations.

DAVE SINGER: Thanks, Jonathan.

JONATHAN FEENEY: I just have one question for Rick. I would love to understand, maybe looking at the capital expenditure. What maybe is a good maintenance run rate of capital expenditure for this business? And to the extent that next year is above that level, which I understand it is, could you talk about the payback period that you sort of look at on these productivity initiatives? And how we can expect those to flow into earnings in years ahead, just philosophically? Thank you.

RICK PUCKETT: Yes. I mean, our maintenance capital, we estimate around \$30 million to \$35 million, which is similar to our depreciation. The rest of that is amortization of a lot of intangibles. So it's probably closer to \$35 million than \$30 million. When we look at a capital expenditure -- and these are large capital expenditures -- they are \$20 million each, and north of that, right? So it's a pretty significant investment in our business. And our hurdle rates are at least a 12% internal rate return on those. Which kind of gives you a payback of somewhere around three or four years, or something like that. We expect that after we go through the start-up process, that we will start to see cash flow being generated from those investments. And we are making a lot of those investments in our Charlotte facility, we are making them in other facilities as well. In our Cape Cod facility up in Hyannis. So we will continue to make those investments to enhance our quality and to enhance our efficiencies going forward. We feel that we are in a place which, coming out of 2013, will be closer to that. So in future years, our CapEx is probably going to be a little bit lower, and a little bit more like the 4% or so of revenue that we see our peer group in.

JONATHAN FEENEY: Okay, thank you very much.

OPERATOR: (Operator Instructions)

Amit Sharma of BMO Capital Markets.

AMIT SHARMA, ANALYST, BMO CAPITAL MARKETS: Hi, good morning, everyone.

CARL LEE: Good morning.

AMIT SHARMA: Carl, just a question on the non-branded portion of the portfolio. As we look at 2013, should we assume that that portfolio is stabilized to the point where we won't see a year-over-year decline? Or are you still going through the process of culling out some of the unprofitable business?

CARL LEE: Most of the heavy lifting is behind us. So we are beginning to see some stabilization in 2013. We are going to continue to manage that business to really protect the franchise, but at the same time, make sure that we kind of maximize our margins. So we will see the top line improve. And we will continue to see some additional ways to try to make sure we just kind of leverage that business to not only grow, but to support our core brands as well.

AMIT SHARMA: Got it. And as I calculate margins on that business, I have like 3% to 4% margin in that business. Should I expect that to increase, given all the portfolio realignment that you are doing in that business? Maybe 50-, 60-basis point increase in operating margin from that business?

RICK PUCKETT: Yes. We obviously are not talking about margins in our specific businesses. But if you look at the peer group on private brands, it is somewhere between some 7% and 9% operating margins. And we believe that we are producing and running our businesses to be consistent with that.

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AMIT SHARMA: Okay. So 7% to 9% for the private label business, and then probably lower margins for partner brands, is that right?

RICK PUCKETT: Well, partner brands is simply a distribution model, right? So what you have there is what you might see in other distributors, which could be anywhere from 2% to 5%, depending on the distributor.

AMIT SHARMA: Got it. And then, just a clarification. Carl, in response to an earlier question, you were saying that some of the growth in acquisition could be -- through acquisition -- could be in the areas where they are traditionally difficult to service by DSD. As we look at going forward, is acquisition going to be driven by a desire to become bigger in your core categories? Or does the Snack Factory acquisition give you the flexibility of maybe going outside of the current portfolio, and maybe leverage your expertise in DSD?

CARL LEE: I think it's a little bit more the latter. I think the key for us is, we are very in-tune to building distribution. We clearly see distribution as a driver for our overall business. And we see it as a way to really support our brands. But we also come to the realization that while we are committed to our DSD distribution -- we will continue to expand it, continue to grow, continue to look for acquisitions in distribution -- we have to realize that not everything is going to be able to go through that system to hit the store shelves as we see today. So it does create some flexibility for us to have a world-class DSD system, to continue to bring new product innovation through in our new brands that we acquire or build. It also gives us the added flexibility to fill in where DSD cannot get, with our direct sales organization. So we see it as an incremental opportunity for us over and above DSD, to have an item like Snack Factory, and the flexibility to have a distribution in place to support it and other brands that we may work with over time.

AMIT SHARMA: Great, I appreciate it, thank you very much.

OPERATOR: Michael Gallo of CL King.

MICHAEL GALLO, ANALYST, CL KING & ASSOCIATES: Hi, good morning, and congratulations to David on his retirement.

DAVE SINGER: Thank you.

MICHAEL GALLO: My question is just on the private brands business. Should we expect to see some moderation in the declines there in 2013? At this point, is the portfolio where you want it to be in terms of being able to get adequate pricing and margins? Or do you expect we will see further rationalization this year? Thank you.

CARL LEE: The rationalization for the most part is behind us. We went through a lot of heavy lifting throughout 2012. It was a pretty deep dive on where we are making money and how we could improve it. And so most of the rationalization is behind us. And we will just continue to watch commodity costs, input costs, and then if we have to make future adjustments, we will. But overall, we're in pretty good shape as we look into 2013, based on everything we know today with input costs and commodities.

MICHAEL GALLO: Thank you.

MARK CARTER, LANCE INC - VP & IR OFFICER, SNYDER'S: Hello?

OPERATOR: Akshay Jagdale of KeyBanc.

AKSHAY JAGDALE: Thanks for taking the follow-up. This question is more philosophical or longer-term, looking at acquisitions. The way I look at your business -- I want to make sure I'm not misunderstanding the opportunity. But when I look at your business from our perspective, I see that there is a lot of room on the manufacturing side in terms of utilization, as evidenced by the volume you have flowing through on private label, as well as co-manufacturing. And I also similarly see a lot of room to expand through your DSD network. Because, from what I understand, there is a lot more room for more product to flow through each of the trucks that operate in your DSD network. So if that is the right understanding, I would also assume that if you were to acquire a DSD brand, it would tend to be more accretive than, let's say, a warehouse product. So am I thinking of this, generally speaking,

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correctly? I mean, I know you can't go out there and buy something that is not available, right? You have to be opportunistic, and that seems to be what you did with Snack Factory. But is that really where the leverage is, the way I understand it? Or am I understanding your business model incorrectly?

CARL LEE: I think your overall understanding of our business model is correct. I think that when we do look for targets, clearly the number one criteria is that it will be accretive. And I think what we have been able to demonstrate is that Snack Factory is accretive. And to your point, we can always expand our DSD system and put more products through that, so that could also be a way to leverage that infrastructure and add additional margin. I think that we have really opened some unique flexibility to be able to fully leverage a DSD system works really good. And then use a direct model to fill in where we can get with DSD. So I would expect anything that we can do to expand either one of those distribution systems would be to our advantage.

AKSHAY JAGDALE: Okay. And just to that end from a financial standpoint, can you remind us where your leverage is today? Where you expect it to go post this acquisition? How quickly it could get leveraged down? And in the short-term, if you still have flexibility and the appetite to continue to expand if the right thing comes along?

RICK PUCKETT: Yes. Our leverage is around 3.0 right now, Akshay. And we do believe we have capacity to do -- to be able to react to things, or proactively look at things today. And to Carl's point, we will look at things that are accretive right away, as we have done in the past. So we do believe we have that capacity. As far as paying down our debts, that is where all of our free cash flow goes right now. That plus the dividend. You know, that is our strategy. We expect to drive that down much more in line with 2 to 2.5 times leverage throughout this year, probably closer to 2.5, as we pay down that debt. But the industry average right now is probably around 3.0. We are comfortable right where we are. We would not be comfortable too much higher than that. So our goal would be to reduce that leverage over time.

AKSHAY JAGDALE: Okay, thank you. I will pass it on.

OPERATOR: There are no further questions at this time. I turn the call back over to Mr. Dave Singer, Chief Executive Officer, for closing remarks.

DAVE SINGER: Sarah, thank you very much, and thanks, everybody, for joining the call. Appreciate all the support, and really look forward to watching Carl and management team and the organization go forward. It's been a great decade involved with the Company, a great eight years as CEO. And I am really proud of what has been accomplished, and incredibly optimistic that the foundation is built to really continue to drive this business going forward. So thanks for everything, and I look forward to the future. Thank you.

OPERATOR: This concludes today's conference call. You may now disconnect.

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Snyder's-Lance, Inc. Reports Results for Full Year 2012.

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Body

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-- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items
-- Reports 2012 full year earnings per diluted share of \$0.95 excluding special items
-- Reports 2012 full year earnings per diluted share of \$0.85 including special items
-- Completes merger integration work and Snack Factory acquisition during 2012
-- Positive outlook in 2013 for Net Revenue and Earnings per Share

CHARLOTTE, N.C., Feb. 12, 2013 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq: LNCE) today reported results for its fiscal year 2012. Net revenues for the year ended December 29, 2012, were \$1.62 billion, a decrease of 1.0% from prior year net revenues of \$1.64 billion. Net revenue, when adjusted for the impact of the independent business owner ("IBO") route system conversion, increased 2.2% year over year. The Company realized full year net income of \$66.1 million, excluding special items, or \$0.95 per diluted share, as compared to full year 2011 net income of \$47.8 million, excluding special items, or \$0.70 per diluted share. Net income, including special items, was \$59.1 million, or \$0.85 per diluted share, for the full year 2012 compared to \$38.3 million, or \$0.56 per diluted share, for 2011.

(Logo: <http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

Special items for 2012 were \$7.0 million, after tax expense, and included approximately \$2.6 million in severance costs and professional fees related to merger and integration activities, approximately \$6.6 million in asset impairment charges, approximately \$4.9 million in charges related to consolidation activities, and approximately \$1.2 million in expenses associated with the acquisition of Snack Factory. Special items for 2012 also included gains on the sale of route businesses of approximately \$8.3 million, net of the incremental taxes incurred on these gains. Special items, after tax expense, for 2011 included approximately \$12.8 million of severance and professional fee expenses associated with merger and other integration efforts, approximately \$6.5 million related to the impairment of transportation equipment, and approximately \$1.7 million of impairment charges related to the closing of a manufacturing facility in Corsicana, TX. Special items for 2011 also included after-tax gains on the sale of route businesses of approximately \$5.0 million and approximately \$6.5 million related to a change in vacation plan.

Fourth quarter 2012 net revenues were \$420 million including sales of **Pretzel Crisps(R)**, an increase of 1.9% compared to prior year fourth quarter net revenues of \$412 million. Fourth quarter 2012 net income was \$20.4 million, excluding special items, which was 44.4% above the \$14.1 million of net income, excluding special items for the prior year. Net income including special items was \$7.8 million for the fourth quarter 2012 compared to a fourth quarter 2011 net income including special items of \$22.4 million.

Comments from Management

"This was an important and successful year for Snyder's-Lance," commented David V. Singer, Chief Executive Officer. "During 2012, we grew our earnings more than 35%, excluding special items, and grew our sales by 2.2% when the impact of our IBO conversion is excluded. We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover(R), Lance(R) and Cape Cod(R), and we acquired Snack Factory(R) and the fast-growing **Pretzel Crisps(R)** brand. In 2012, we also invested in capacity and innovation capabilities while we improved margins on our non-branded items by discontinuing sales to certain customers who did not accept price increases. In the coming year, we'll continue to build

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on this solid foundation as we drive for results that grow our top line and expand our margins through innovation and continued strong execution in the marketplace. Our new R&D center will open in 2013, and it will support aggressive innovation goals for our future."

Mr. Singer continued, "As we recently announced, I have elected to retire from my role as CEO following our annual shareholders meeting on May 3, 2013. Carl E. Lee, Jr. our President and COO, will take on the title of CEO at that time. Our plans for 2013 and beyond look very bright, and with Carl's exceptional leadership, I am confident in our ability to grow the Company and drive shareholder value as we expand our reach to new consumers and markets."

Dividend Declared

The Company also announced the declaration of a quarterly cash dividend of \$0.16 per share on the Company's common stock. The dividend is payable on March 6, 2013 to stockholders of record at the close of business on February 27, 2013.

Estimates provided for 2013

The Company estimates that its net revenue for the full year 2013 will be up 10% to 12% when compared to 2012. Estimates for earnings per diluted share show an increase between 22% and 32% compared to 2012 earnings per diluted share, excluding special items. Capital expenditures for 2013 are projected to be between \$78 and \$83 million as investments are made in plant improvements, quality, capacity and innovation.

Conference Call

Management will conduct a conference call and live webcast at 9:00am eastern time on Tuesday, February 12, 2013 to review the Company's full year results. The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website,

www.snyderslance.com. In addition, the slide presentation will be available to download and print approximately 30 minutes before the webcast at www.snyderslance.com. To participate in the conference call, the dial-in number is (866) 814-7293 for U.S. callers or (702) 696-4943 for international callers. A continuous telephone replay of the call will be available between 1:00 pm on February 12 and midnight on February 19. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 93605983. Investors may also access a web-based replay of the conference call at www.snyderslance.com.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover(R), Lance(R), Cape Cod(R), Pretzel Crisps(R), Krunchers!(R), Tom's(R), Archway(R), Jays(R), Stella D'oro(R), EatSmart(R), O-Ke-Doke(R), Grande(R) and Padrinos(R) brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

Cautionary Note Regarding Forward-Looking Statements

This press release includes statements about future economic performance, finances, expectations, plans and prospects of Snyder's-Lance, that constitute forward-looking statements for purposes of the safe harbor provisions of the Private Securities Litigation Reform Act of 1995. Some forward-looking statements may be identified by the use of terms such as "believe," "anticipate," "intend," "expect," "project," "plan," "may," "should," "could," "will," "estimate," "predict," "potential," "continue," and similar words. Such forward-looking statements are subject to certain risks, uncertainties and other important factors that could cause actual results to differ materially from those expressed in or suggested by such statements.

For further information regarding cautionary statements and factors affecting future results, please refer to the risk factors in the Company's most recent Annual Report on Form 10-K and Quarterly Reports on Form 10-Q filed subsequent to the Annual Report. Readers are cautioned not to unduly rely on forward looking statements, which speak only as of the date made. The Company undertakes no obligation to update or revise publicly any forward-looking statement whether as a result of new information, future developments or otherwise.

SNYDER'S-LANCE, INC. AND SUBSIDIARIES Consolidated Statements of Income (Unaudited) (in thousands, except per share data)

Quarter Ended	Fiscal Year Ended	December 29, 2012	December 31, 2011	December 29, 2012	December 31, 2011
2011					

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Net revenue	\$ 419,826	\$ 412,127	\$ 1,618,634	\$ 1,635,036
Cost of sales	277,209	268,012	1,079,777	1,065,107
Gross margin	142,617	144,115	538,857	569,929
 Selling, general and administrative		115,733	110,412	440,597
495,267				
Impairment charges	11,655	2,585	11,862	12,704
Gain on sale of route businesses,			net (739)	(5,652)
(9,440)				(22,335)
Other (income)/expense, net	(283)	1,381	(407)	993
Income before interest and income taxes			16,251	35,389
70,405				109,140
 Interest expense, net	3,229	2,496	9,487	10,560
Income before income taxes	13,022	32,893	99,653	59,845
 Income tax expense	5,212	10,274	40,143	21,104
Net income	7,810	22,619	59,510	38,741
Net income attributable to noncontrolling interests			28	192
483				425
Net revenue attributable to Snyder's-Lance, Inc.	\$ 7,782		\$ 22,427	\$ 59,085
38,258				
 Basic earnings per share	\$ 0.11	\$ 0.33	\$ 0.86	\$ 0.57
Weighted average shares outstanding		--	basic 68,725	67,798
67,400				68,382
 Diluted earnings per share	\$ 0.11	\$ 0.33	\$ 0.85	\$ 0.56
Weighted average shares outstanding		--	diluted 69,586	68,882
68,478				69,215
 Cash dividends declared per share	\$ 0.16		\$ 0.16	\$ 0.64
0.64				

SNYDER'S-LANCE, INC. AND SUBSIDIARIES Consolidated Balance Sheets (Unaudited) As of December 29, 2012 and December 31, 2011 (in thousands, except share data)

2012	2011	
ASSETS		
Current assets:		
Cash and cash equivalents	\$ 9,276	\$ 20,841
Accounts receivable, net		of allowances of \$2,159 and \$1,884,
respectively	141,862	143,238
Inventories	118,256	106,261
Income tax receivable	--	18,119
Deferred income taxes	11,625	21,042
Assets held for sale	11,038	57,822
Prepaid expenses and other current assets	28,676	20,705
Total current assets	320,733	388,028
 Noncurrent assets:		
Fixed assets, net	331,385	313,043
Goodwill	540,389	367,853
Other intangible assets, net	531,735	376,062
Other noncurrent assets	22,490	21,804
Total assets	\$ 1,746,732	\$ 1,466,790

LIABILITIES AND STOCKHOLDERS' EQUITY

Current liabilities:		
Current portion of long-term debt	\$ 20,462	\$ 4,256
Accounts payable	52,753	52,930
Accrued compensation	31,037	29,248

Snyder's-Lance, Inc. Reports Results for Full Year 2012.

Accrued profit-sharing and retirement plans	354	9,249
Accrual for casualty insurance claims	4,779	6,957
Accrued selling and promotional costs	16,240	21,465
Income tax payable	1,263	--
Other payables and accrued liabilities	27,735	31,041
Total current liabilities	154,623	155,146
 Noncurrent liabilities:		
Long-term debt	514,587	253,939
Deferred income taxes	176,037	196,244
Accrual for casualty insurance claims	9,759	7,724
Other noncurrent liabilities	19,551	15,146
Total liabilities	874,557	628,199
 Commitments and contingencies	--	--
 Stockholders' equity:		
Common stock, \$0.83 1/3 par value. Authorized 75,000,000 shares; 68,863,974 and 67,820,798 shares outstanding,		
respectively	57,384	56,515
Preferred stock, \$1.00 par value. Authorized 5,000,000 shares; no shares outstanding	--	--
 Additional paid-in capital	746,155	730,338
Retained earnings	50,847	35,539
Accumulated other comprehensive income	15,118	13,719
Total	Snyder's-Lance, equity	Inc.
869,504	836,111	stockholders'
Noncontrolling interests	2,671	2,480
Total stockholders' equity	872,175	838,591
Total liabilities and	stockholders'	equity
\$ 1,746,732	\$ 1,466,790	
 SNYDER'S-LANCE, INC. AND SUBSIDIARIES Condensed Consolidated Statements of Cash Flows (Unaudited) For the Fiscal Years Ended December 29, 2012 and December 31, 2011 (in thousands)		
2012	2011	
 Operating activities:		
Net income	\$ 59,510	\$ 38,741
Adjustments to reconcile net income to operating cash flows:		
Depreciation and amortization	53,764	55,337
Stock-based compensation expense	4,693	2,535
Loss on sale of fixed assets, net	597	1,851
Gain on sale of route businesses	(22,335)	(9,440)
Impairment charges	11,862	12,704
Change in vacation plan	--	(9,916)
Deferred income taxes	(15,279)	6,026
Provision for doubtful accounts	1,479	402
Changes in operating assets and liabilities, excluding business acquisitions	(1,523)	13,288
Net cash provided by operating activities	92,768	111,528
 Investing activities:		
Purchases of fixed assets	(80,304)	(57,726)
Purchases of route businesses	(28,523)	(31,418)
Proceeds from sale of fixed assets	9,324	4,351
Proceeds from sale of route businesses	93,896	42,294
Proceeds from sale of investments	1,444	960
Proceeds from federal grant for solar farm	--	4,212
Business acquisitions, net		
acquired	(344,181)	(15,394)
Net cash used in investing activities	(348,344)	(52,721)

Snyder's-Lance, Inc. Reports Results for Full Year 2012.

Financing activities:

Dividends paid to stockholders	(43,777)	(42,918)				
Dividends paid to noncontrolling interests	(234)	(281)				
Acquisition of remaining interest in Melisi Snacks, Inc.	-- (3,500)					
Debt issuance costs	(2,028)	--				
Issuances of common stock	9,710	8,142				
Excess compensation tax		benefits	from			stock-based
Repurchases of common stock	(335)	--				
Repayments of long-term debt	(2,476)	(62,309)				
Proceeds from long-term debt	325,211	--				
Net facilities (repayments)/proceeds			from			existing credit
Net cash provided by/(used in) financing activities	(44,841)	35,098				
Effect of exchange rate changes on cash	163	(124)				
Decrease in cash and cash equivalents	(11,565)	(7,036)				
Cash and cash equivalents at beginning of fiscal year	20,841	27,877				
Cash and cash equivalents at end of fiscal year	\$ 9,276	\$ 20,841				

Supplemental information:

Cash paid for income taxes, net of refunds of \$12,591, \$7,375 and \$23, respectively
\$ 33,554 \$ 2,364
Cash paid for interest \$ 10,533 \$ 11,341
SNYDER'S-LANCE, INC. AND SUBSIDIARIES Reconciliation of Non-GAAP Measures (Unaudited) (in thousands, except per share data)

Net of Tax Per Diluted Share
Quarter Ended December 29, 2012
Net income attributable to Snyder's-Lance, Inc. \$ 7,782 \$ 0.11

Merger-related items 1,149 0.02
Snack Factory acquisition costs 876 0.01
Manufacturing consolidation activities 3,238 0.04
Trademark impairment 4,966 0.07
Disposal costs and fixed asset impairments 1,896 0.03
Gain on sale of route businesses (411) 0.00
Incremental income tax associated with non-deductible goodwill on the sale of route businesses 897
0.01

Net income attributable to Snyder's-Lance, Inc., excluding special items \$ 20,393 \$ 0.29

Quarter Ended December 31, 2011
Net income attributable to Snyder's-Lance, Inc. \$ 22,427 \$ 0.33

Costs related to closing the Corsicana, TX manufacturing facility 1,690
0.02
Change in vacation policy (6,445) (0.09)
Gain on sale of route businesses (4,618) (0.07)
Other merger-related costs -- severance and professional fees 1,065
0.01

Net income attributable to Snyder's-Lance, Inc., excluding special items \$ 14,119 \$ 0.20

Year Ended December 29, 2012

Snyder's-Lance, Inc. Reports Results for Full Year 2012.

Net income attributable to Snyder's-Lance, Inc. \$ 59,085 \$ 0.85

Merger-related items 2,589 0.04

Snack Factory acquisition costs 1,163 0.02

Manufacturing consolidation activities 4,921 0.07

Trademark impairment 4,966 0.07

Disposal costs and fixed asset impairments 1,621 0.03

Gain on sale of route businesses (13,869) (0.21)

Incremental income tax associated with non-deductible goodwill on the sale of route businesses 5,604
0.08

Net income attributable to Snyder's-Lance, Inc., excluding special items \$ 66,080 \$
0.95

Year Ended December 31, 2011

Net income attributable to Snyder's-Lance, Inc. \$ 38,258 \$ 0.56

Impairment of route trucks 6,481 0.09

Costs related to closing the Corsicana, TX manufacturing facility 1,690
0.02

Change in vacation policy (6,445) (0.09)

Gain on sale of route businesses (4,975) (0.07)

Other merger-related costs -- severance and professional fees 12,764
0.19

Net income attributable to Snyder's-Lance, Inc., excluding special items \$ 47,773 \$
0.70

SOURCE Snyder's-Lance, Inc. [Graphic omitted]

Load-Date: February 15, 2013

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Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

PR Newswire

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Body

Snyder's-Lance, Inc. (Nasdaq: LNCE) today reported results for its fiscal year 2012. Net revenues for the year ended December 29, 2012, were \$1.62 billion, a decrease of 1.0% from prior year net revenues of \$1.64 billion. Net revenue, when adjusted for the impact of the independent business owner ("IBO") route system conversion, increased 2.2% year over year. The Company realized full year net income of \$66.1 million, excluding special items, or \$0.95 per diluted share, as compared to full year 2011 net income of \$47.8 million, excluding special items, or \$0.70 per diluted share. Net income, including special items, was \$59.1 million, or \$0.85 per diluted share, for the full year 2012 compared to \$38.3 million, or \$0.56 per diluted share, for 2011.

(Logo:<http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

Special items for 2012 were \$7.0 million, after tax expense, and included approximately \$2.6 million in severance costs and professional fees related to merger and integration activities, approximately \$6.6 million in asset impairment charges, approximately \$4.9 million in charges related to consolidation activities, and approximately \$1.2 million in expenses associated with the acquisition of Snack Factory. Special items for 2012 also included gains on the sale of route businesses of approximately \$8.3 million, net of the incremental taxes incurred on these gains. Special items, after tax expense, for 2011 included approximately \$12.8 million of severance and professional fee expenses associated with merger and other integration efforts, approximately \$6.5 million related to the impairment of transportation equipment, and approximately \$1.7 million of impairment charges related to the closing of a manufacturing facility in Corsicana, TX. Special items for 2011 also included after-tax gains on the sale of route businesses of approximately \$5.0 million and approximately \$6.5 million related to a change in vacation plan.

Fourth quarter 2012 net revenues were \$420 million including sales of **Pretzel Crisps®**, an increase of 1.9% compared to prior year fourth quarter net revenues of \$412 million. Fourth quarter 2012 net income was \$20.4 million, excluding special items, which was 44.4% above the \$14.1 million of net income, excluding special items for the prior year. Net income including special items was \$7.8 million for the fourth quarter 2012 compared to a fourth quarter 2011 net income including special items of \$22.4 million.

Comments from Management

"This was an important and successful year for Snyder's-Lance," commented David V. Singer, Chief Executive Officer. "During 2012, we grew our earnings more than 35%, excluding special items, and grew our sales by 2.2% when the impact of our IBO conversion is excluded. We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover®, Lance® and Cape Cod®, and we acquired Snack Factory® and the fast growing **Pretzel Crisps®** brand. In 2012, we also invested in capacity and innovation capabilities while we improved margins on our non-branded items by discontinuing sales to certain customers who did not accept price increases.

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

In the coming year, we'll continue to build on this solid foundation as we drive for results that grow our top line and expand our margins through innovation and continued strong execution in the marketplace. Our new R&D center will open in 2013, and it will support aggressive innovation goals for our future."

Mr. Singer continued, "As we recently announced, I have elected to retire from my role as CEO following our annual shareholders meeting on May 3, 2013. Carl E. Lee, Jr. our President and COO, will take on the title of CEO at that time. Our plans for 2013 and beyond look very bright, and with Carl's exceptional leadership, I am confident in our ability to grow the Company and drive shareholder value as we expand our reach to new consumers and markets."

Dividend Declared

The Company also announced the declaration of a quarterly cash dividend of \$0.16 per share on the Company's common stock. The dividend is payable on March 6, 2013 to stockholders of record at the close of business on February 27, 2013.

Estimates provided for 2013

The Company estimates that its net revenue for the full year 2013 will be up 10% to 12% when compared to 2012. Estimates for earnings per diluted share show an increase between 22% and 32% compared to 2012 earnings per diluted share, excluding special items. Capital expenditures for 2013 are projected to be between \$78 and \$83 million as investments are made in plant improvements, quality, capacity and innovation.

Conference Call

Management will conduct a conference call and live webcast at 9:00 am eastern time on Tuesday, February 12, 2013 to review the Company's full year results. The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website,<http://www.snyderslance.com>. In addition, the slide presentation will be available to download and print approximately 30 minutes before the webcast at <http://www.snyderslance.com>. To participate in the conference call, the dial-in number is (866) 814-7293 for U.S. callers or (702) 696-4943 for international callers. A continuous telephone replay of the call will be available between 1:00 pm on February 12 and midnight on February 19. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 93605983. Investors may also access a web-based replay of the conference call at <http://www.snyderslance.com>.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, **Pretzel Crisps®**, Krunchers!®, Tom's®, Archway®, Jays®, Stella D'oro®, EatSmart®, O-Ke-Doke®, Grande® and Padrinos® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-E

Cautionary Note Regarding Forward-Looking Statements

This press release includes statements about future economic performance, finances, expectations, plans and prospects of Snyder's-Lance, that constitute forward-looking statements for purposes of the safe harbor provisions of the Private Securities Litigation Reform Act of 1995. Some forward-looking statements may be identified by use of terms such as "believe," "anticipate," "intend," "expect," "project," "plan," "may," "should," "could," "will," "estimate," "predict," "potential," "continue," and similar words. Such forward-looking statements are subject to certain risks, uncertainties and other important factors that could cause actual results to differ materially from those expressed in or suggested by such statements.

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

For further information regarding cautionary statements and factors affecting future results, please refer to the risk factors in the Company's most recent Annual Report on Form 10-K and Quarterly Reports on Form 10-Q filed subsequent to the Annual Report. Readers are cautioned not to unduly rely on forward looking statements, which speak only as of the date made. The Company undertakes no obligation to update or revise publicly any forward-looking statement whether as a result of new information, future developments or otherwise.

**SNYDER'S-LANCE, INC. AND
SUBSIDIARIES**Consolidated Statements of
Income (Unaudited)(in thousands, except per
share data)

	Quarter Ended	Fiscal Year Ended		
	December 29, 2012	December 31, 2011	December 29, 2012	December 31, 2011
Net revenue	\$ 419,826	\$ 412,127	\$ 1,618,634	\$ 1,635,036
Cost of sales	277,209	268,012	1,079,777	1,065,107
Gross margin	142,617	144,115	538,857	569,929
 Selling, general and administrative	115,733	110,412	440,597	495,267
Impairment charges	11,655	2,585	11,862	12,704
Gain on sale of route businesses, net	(739)	(5,652)	(22,335)	(9,440)
Other (income)/expense, net	(283)	1,381	(407)	993
Income before interest and income taxes	16,251	35,389	109,140	70,405
 Interest expense, net	3,229	2,496	9,487	10,560
Income before income taxes	13,022	32,893	99,653	59,845
 Income tax expense	5,212	10,274	40,143	21,104
Net income	7,810	22,619	59,510	38,741
Net income attributable to noncontrolling interests	28	192	425	483
Net revenue attributable to Snyder's-Lance, Inc.	\$ 7,782	\$ 22,427	\$ 59,085	\$ 38,258
 Basic earnings per share	\$ 0.11	\$ 0.33	\$ 0.86	\$ 0.57
Weighted average shares outstanding - basic	68,725	67,798	68,382	67,400
 Diluted earnings per share	\$ 0.11	\$ 0.33	\$ 0.85	\$ 0.56
Weighted average shares outstanding - diluted	69,586	68,882	69,215	68,478
 Cash dividends declared per share	\$ 0.16	\$ 0.16	\$ 0.64	\$ 0.64

**SNYDER'S-LANCE, INC. AND
SUBSIDIARIES**Consolidated Balance Sheets

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

(Unaudited)As of December 29, 2012 and
December 31, 2011 (in thousands, except share
data)

	2012	2011
ASSETS		
Current assets:		
Cash and cash equivalents	\$ 9,276	\$ 20,841
Accounts receivable, net of allowances of \$2,159 and \$1,884, respectively	141,86 2	143,23 8
Inventories	118,25 6	106,26 1
Income tax receivable	-	18,119
Deferred income taxes	11,625	21,042
Assets held for sale	11,038	57,822
Prepaid expenses and other current assets	28,676	20,705
Total current assets	320,73 3	388,02 8
Noncurrent assets:		
Fixed assets, net	331,38 5	313,04 3
Goodwill	540,38 9	367,85 3
Other intangible assets, net	531,73 5	376,06 2
Other noncurrent assets	22,490	21,804
Total assets	\$ 1,746,7 32	\$ 1,466,7 90
LIABILITIES AND STOCKHOLDERS' EQUITY		
Current liabilities:		
Current portion of long-term debt	\$ 20,462	\$ 4,256
Accounts payable	52,753	52,930
Accrued compensation	31,037	29,248
Accrued profit-sharing and retirement plans	354	9,249
Accrual for casualty insurance claims	4,779	6,957
Accrued selling and promotional costs	16,240	21,465
Income tax payable	1,263	-
Other payables and accrued liabilities	27,735	31,041
Total current liabilities	154,62 3	155,14 6
Noncurrent liabilities:		
Long-term debt	514,58 7	253,93 9

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

Deferred income taxes	176,03 7	196,24 4
Accrual for casualty insurance claims	9,759	7,724
Other noncurrent liabilities	19,551	15,146
Total liabilities	874,55 7	628,19 9
Commitments and contingencies	-	-
Stockholders' equity:		
Common stock, \$0.83 1/3 par value. Authorized 75,000,000 shares; 68,863,974 and 67,820,798 shares outstanding, respectively	57,384	56,515
Preferred stock, \$1.00 par value. Authorized 5,000,000 shares; no shares outstanding	-	-
Additional paid-in capital	746,15 5	730,33 8
Retained earnings	50,847	35,539
Accumulated other comprehensive income	15,118	13,719
Total Snyder's-Lance, Inc. stockholders' equity	869,50 4	836,11 1
Noncontrolling interests	2,671	2,480
Total stockholders' equity	872,17 5	838,59 1
Total liabilities and stockholders' equity	\$ 1,746,7 32	\$ 1,466,7 90

**SNYDER'S-LANCE, INC. AND
SUBSIDIARIES**Condensed Consolidated
Statements of Cash Flows (Unaudited)For the
Fiscal Years Ended December 29, 2012 and
December 31, 2011(in thousands)

	2012	2011
Operating activities:		
Net income	\$ 59,51 0	\$ 38,74 1
Adjustments to reconcile net income to cash from operating activities:		
Depreciation and amortization	53,764	55,337
Stock-based compensation expense	4,693	2,535
Loss on sale of fixed assets, net	597	1,851
Gain on sale of route businesses	(22,335)	(9,440)
Impairment charges	11,862	12,704
Change in vacation plan	-	(9,916)
Deferred income taxes	(15,279)	6,026
Provision for doubtful accounts	1,479	402
Changes in operating assets and liabilities, excluding business acquisitions	(1,523)	13,288

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

Net cash provided by operating activities	92,768	111,52 8
Investing activities:		
Purchases of fixed assets	(80,304	(57,726)
Purchases of route businesses	(28,523	(31,418)
Proceeds from sale of fixed assets	9,324	4,351
Proceeds from sale of route businesses	93,896	42,294
Proceeds from sale of investments	1,444	960
Proceeds from federal grant for solar farm	-	4,212
Business acquisitions, net of cash acquired	(344,18 1)	(15,394)
Net cash used in investing activities	(348,34 4)	(52,721)
Financing activities:		
Dividends paid to stockholders	(43,777)	(42,918)
Dividends paid to noncontrolling interests	(234)	(281)
Acquisition of remaining interest in Melisi Snacks, Inc.	-	(3,500)
Debt issuance costs	(2,028)	-
Issuances of common stock	9,710	8,142
Excess tax benefits from stock-based compensation	2,618	49
Repurchases of common stock	(335)	-
Repayments of long-term debt	(2,476)	(62,309)
Proceeds from long-term debt	325,21 1	-
Net (repayments)/proceeds from existing credit facilities	(44,841)	35,098
Net cash provided by/(used in) financing activities	243,84 8	(65,719)
Effect of exchange rate changes on cash	163	(124)
Decrease in cash and cash equivalents	(11,565)	(7,036)
Cash and cash equivalents at beginning of fiscal year	20,841	27,877
Cash and cash equivalents at end of fiscal year	\$ 9,276	\$ 20,84 1
Supplemental information:		
Cash paid for income taxes, net of refunds of \$12,591, \$7,375 and \$23, respectively	\$ 33,55 4	\$ 2,364
Cash paid for interest	\$ 10,53 3	\$ 11,34 1

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

**SNYDER'S-LANCE, INC. AND
SUBSIDIARIES Reconciliation of Non-GAAP
Measures (Unaudited) (in thousands, except per
share data)**

	Net of Tax	Per Diluted Share
Quarter Ended December 29, 2012		
Net income attributable to Snyder's-Lance, Inc.	\$ 7,782	\$ 0.11
Merger-related items	1,149	0.02
Snack Factory acquisition costs	876	0.01
Manufacturing consolidation activities	3,238	0.04
Trademark impairment	4,966	0.07
Disposal costs and fixed asset impairments	1,896	0.03
Gain on sale of route businesses	(411)	0.00
Incremental income tax associated with non-deductible goodwill on the sale of route businesses	897	0.01
Net income attributable to Snyder's-Lance, Inc., excluding special items	\$ 20,393	\$ 0.29
Quarter Ended December 31, 2011		
Net income attributable to Snyder's-Lance, Inc.	\$ 22,427	\$ 0.33
Costs related to closing the Corsicana, TX manufacturing facility	1,690	0.02
Change in vacation policy	(6,445)	(0.09)
Gain on sale of route businesses	(4,618)	(0.07)
Other merger-related costs - severance and professional fees	1,065	0.01
Net income attributable to Snyder's-Lance, Inc., excluding special items	\$ 14,119	\$ 0.20
Year Ended December 29, 2012		
Net income attributable to Snyder's-Lance, Inc.	\$ 59,085	\$ 0.85
Merger-related items	2,589	0.04
Snack Factory acquisition costs	1,163	0.02
Manufacturing consolidation activities	4,921	0.07
Trademark impairment	4,966	0.07
Disposal costs and fixed asset impairments	1,621	0.03
Gain on sale of route businesses	(13,869)	(0.21)
Incremental income tax associated with non-deductible goodwill on the sale of route businesses	5,604	0.08

Snyder's-Lance, Inc. Reports Results for Full Year 2012; -- Grows earnings per diluted share more than 51% vs. prior year, 35% excluding special items

Net income attributable to Snyder's-Lance, Inc., excluding special items	\$	66,080	\$	0.95
Year Ended December 31, 2011				
Net income attributable to Snyder's-Lance, Inc.	\$	38,258	\$	0.56
Impairment of route trucks		6,481		0.09
Costs related to closing the Corsicana, TX manufacturing facility		1,690		0.02
Change in vacation policy		(6,445)		(0.09)
Gain on sale of route businesses		(4,975)		(0.07)
Other merger-related costs - severance and professional fees		12,764		0.19
Net income attributable to Snyder's-Lance, Inc., excluding special items	\$	47,773	\$	0.70

SOURCE Snyder's-Lance, Inc.

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Snyder's-Lance reports slight earnings decrease in 2012

York Daily Record (Pennsylvania)

February 12, 2013 Tuesday

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Body

Feb. 12--Snyder's-Lance reported a decrease in net revenue for fiscal year 2012.

Net revenues for the year, which ended Dec. 29, were \$1.62 billion, a decrease of 1 percent from 2011 revenues, which were \$1.64 billion. The total was negatively impacted by the company's efforts to change its delivery routes to an "independent business owner" model, according to a news release.

Excluding the impact of that project, revenue, the company said, increased 2.2 percent in 2012.

Snyder's-Lance realized full year net income of \$66.1 million, excluding special items, or \$0.95 per diluted share, as compared to full year 2011 net income of \$47.8 million, excluding special items, or \$0.70 per diluted share.

Net income, including special items, was \$59.1 million, or \$0.85 per diluted share, for the full year 2012 compared to \$38.3 million, or \$0.56 per diluted share, for 2011.

Special items for 2012 were \$7 million, after tax expense, and included approximately \$2.6 million in severance costs and professional fees related to merger and integration activities, approximately \$6.6 million in asset impairment charges, approximately \$4.9 million in charges related to consolidation activities, and approximately \$1.2 million in expenses associated with the acquisition of Snack Factory, maker of **Pretzel Crisps**.

Special items for 2012 also included gains on the sale of route businesses of approximately \$8.3 million, net of the incremental taxes incurred on these gains.

Fourth quarter 2012 net revenues were \$420 million including sales of **Pretzel Crisps**, an increase of 1.9 percent compared to 2011 fourth quarter net revenues of \$412 million.

Fourth quarter 2012 net income was \$20.4 million, excluding special items, which was 44.4 percent above the \$14.1 million of net income, excluding special items for the prior year.

Net income including special items was \$7.8 million for the fourth quarter 2012 compared to a fourth quarter 2011 net income including special items of \$22.4 million.

In 2012, Snyder's-Lance improved profit margins on non-branded products by discontinuing sales to certain customers who did not accept price increases, said CEO David V. Singer.

Carl E. Lee Jr, current president and chief operating officer, will take over the CEO role for Singer, who is retiring in May.

Snyder's-Lance reports slight earnings decrease in 2012

The company also declared a quarterly cash dividend of 16 cents per share of common stock. The dividend is payable on March 6 to stockholders of record at the close of business Feb. 27.

For a more detailed earnings report, click [here](#).

Snyder's-Lance acquires manufacturer of pretzel-shaped crackers

Snyder's-Lance names new CEO

Georgia distribution company is acquired by Snyder's-Lance

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Lance Earnings: Here's Why Investors are Not Excited Now

Wall St. Cheat Sheet

February 12, 2013 Tuesday 4:13 PM EST

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Length: 523 words

Body

Feb 12, 2013 (Wall St. Cheat Sheet:<http://wallstcheatsheet.com/> Delivered by Newstex)

Lance, Inc. (NASDAQ:LNCE[1]) delivered a profit and beat Wall Street's expectations, BUT came up short on beating the revenue expectation. The revenue miss is a negative sign to shareholders seeking high growth out of the company. Shares are down 1%.

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Lance, Inc. Earnings Cheat Sheet

Results: Adjusted Earnings Per Share increased 3.57% to \$0.29 in the quarter versus EPS of \$0.20 in the year-earlier quarter.

Revenue: Rose 1.86% to \$419.8 million from the year-earlier quarter.

Actual vs. Wall St. Expectations: Lance, Inc. reported adjusted EPS income of \$0.29 per share. By that measure, the company beat the mean analyst estimate of \$0.26. It missed the average revenue estimate of \$424.33 million.

Quoting Management: 'This was an important and successful year for Snyder's-Lance,' commented David V. Singer, Chief Executive Officer. 'During 2012, we grew our earnings more than 35%, excluding special items, and grew our sales by 2.2% when the impact of our IBO conversion is excluded. We completed our merger integration, while we also rolled out and began to implement our strategic plan. In line with this plan, we delivered strong growth in our core branded items of Snyder's of Hanover®, Lance® and Cape Cod®, and we acquired Snack Factory® and the fast growing **Pretzel Crisps®** brand. In 2012, we also invested in capacity and innovation capabilities while we improved margins on our non-branded items by discontinuing sales to certain customers who did not accept price increases. In the coming year, we'll continue to build on this solid foundation as we drive for results that grow our top line and expand our margins through innovation and continued strong execution in the marketplace. Our new Ramp;D center will open in 2013, and it will support aggressive innovation goals for our future.'

Key Stats (on next page)

Revenue increased 3.25% from \$406.57 million in the previous quarter. EPS increased 3.57% from \$0.28 in the previous quarter.

Looking Forward: Analysts have a more negative outlook for the company's next-quarter performance. Over the past three months, the average estimate for next quarter's earnings has fallen from a profit of \$0.28 to a profit \$0.26. For the current year, the average estimate has moved down from a profit of \$0.93 to a profit of \$0.92 over the last ninety days.

Stocks with improving earnings metrics are worthy of your extra attention. In fact, 'E = Earnings Are Increasing Quarter-Over-Quarter' is a core component of our CHEAT SHEET investing framework for this very reason. Don't waste another minute - click here and get our CHEAT SHEET stock picks now[3].

(Company fundamentals provided by Xignite Financials. Email any earnings discrepancies to earnings [at] wallstcheatsheet.com)

[1]: <http://wallstcheatsheet.com/stock-research/company?qs=LNCE> [2]:
<https://wallstcheatsheet.com/newsletters/wscs-premium/?ref=PBAL134> [3]:
<https://wallstcheatsheet.com/newsletters/wscs-premium/?ref=EAAL>

Lance Earnings: Here's Why Investors are Not Excited Now

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Snyder's-Lance income takes 4Q hit, still up for the year

Charlotte Business Journal

February 12, 2013 Tuesday

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CHARLOTTE BUSINESS JOURNAL

Length: 343 words

Byline: Jen Wilson

Body

Snyder's-Lance Inc. is reporting net income of \$7.8 million, or 11 cents per diluted share, for its fourth quarter ended Dec. 29, down from \$22.6 million, or 33 cents per share, in the corresponding period in 2011.

Excluding special items, which include an \$11.5 million impairment charge, Snyder's-Lance earned \$20.4 million in the fourth quarter, an increase of 20 percent over the comparable figure for the year-ago period.

The Charlotte-based snack maker's revenue climbed to \$419.8 million in the most recent quarter from \$412.1 million a year earlier, according to the company's earnings release.

For the full fiscal year, Snyder's-Lance (NASDAQ:LNCE) posted net income of \$59.1 million, or 85 cents per diluted share, in 2012, up from \$38.7 million, or 56 cents per share, in 2011. Revenue remained essentially flat last year at \$1.6 billion.

"This was an important and successful year for Snyder's-Lance," says CEO David Singer, noting the company's work on merger integration and growth in its core brands. Acquisition activity during the year included the \$340 million purchase of the Snack Factory in October.

As previously reported, Singer will retire as CEO of Snyder's-Lance following the company's annual meeting in May. He will be succeeded by Carl Lee Jr., who has been the company's president and chief operating officer since December 2010.

Snyder's-Lance products are sold under brand names that include Snyder's of Hanover, Lance, Cape Cod, Tom's, Archway and **Pretzel Crisps**, as well as private-label and third-party brands.

The company has more than 1,000 employees in Charlotte and operates manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. It also has a solar-powered research and development center under construction in Pennsylvania; that facility is slated to open later this year.

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Snyder's-Lance income takes 4Q hit, still up for the year

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Snyder's-Lance Q4 Profit Incl. Special Items Decreases - Quick Facts

RTT News (United States)

February 12, 2013 Tuesday

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Length: 232 words

Body

(RTTNews) - Snyder's-Lance Inc. (LNCE) reported fourth-quarter net income including special items of \$7.8 million compared to \$22.4 million last year. Profit per share was \$0.11 compared to \$0.33 last year. Excluding special items, net income was \$20.4 million or \$0.29 per share compared to \$14.1 million or \$0.20 per share prior year. Net revenues were \$420 million including sales of **Pretzel Crisps**, an increase of 1.9% from \$412 million prior year.

Although revenue increased from prior year levels, the company recorded lower gross margin for the fourth-quarter.

On average, ten analysts polled by Thomson Reuters expected the company to report profit of \$0.26 per share for the quarter. Analysts' estimates typically exclude special items. Analysts expected revenue of \$424.33 million for the quarter.

The company also announced a quarterly cash dividend of \$0.16 per share. The dividend is payable on March 6, 2013 to stockholders of record at the close of business on February 27, 2013.

The company estimates that its net revenue for the full year 2013 will be up 10% to 12% from 2012. Estimates for earnings per share show an increase between 22% and 32% compared to 2012 earnings per share, excluding special items. Analysts expect the company to report 2013 profit per share of \$1.26.

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Super savings for Super Bowl Parties

Post & Courier (Charleston, SC)

February 1, 2013 Friday

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Section: 04,D; Pg. 1

Length: 726 words

Body

Football season will come to a close this weekend, and no matter if your team made it to the Super Bowl, most of you will celebrate the event with friends, beers or other beverages and lots of snacks.

If you've been dubbed the party planner, don't panic. Super Bowl parties are casual and can be relatively inexpensive to put together. Follow these tips and you'll save money on everything you'll need from kickoff to cleanup.

Compare drink prices

Harris Teeter has some of the best prices on cases of beer this week. Brews by Budweiser, Miller, Coors and Yuengling are \$13.99 per 24-pack of cans. For craft beer aficionados, check out Total Wine. They carry six-packs of high quality brews for as low as \$6.99. You may want to opt for a keg if you're planning to buy more than six cases. Safeway on Reid Street is a favorite spot for many because they have some of the best deals on keg brews, with Keystone priced at \$61 per keg, Miller High Life at \$74 and Pabst Blue Ribbon at \$76. You'll also want to include nonalcoholic beverages, and soft drinks tend to be easiest for big groups. At Harris Teeter, you can get three 12-packs of Coca-Cola can drinks for free when you buy two 12-packs. Pepsi can drinks are \$4.99 per 18-pack at Piggly Wiggly.

Buy practical food

The first way to save money on party food is to know what your guests will eat. Don't buy pre-packaged veggie or fruit and cheese trays. They're expensive and you'll end up throwing most of it away. Instead, aim for creative dips and finger foods. Guacamole is popular and super easy to make. You'll need lots of avocados, which you can find for 50 cents each at Food Lion this week. **Pretzel crisps** and hummus are one of my favorite combinations, and Publix has both items for buy one, get one free this week. Tostitos chips and salsa also are buy one, get one free at Harris Teeter. Wings and pizza are typical go-to foods for football fans, so you can find good deals on both this weekend. The 25-piece wing sampler is \$21.49 at Kickin' Chicken, so if you buy two, that's about \$4 cheaper than a 50-piece platter we saw at another major wings player. Local pizzeria Andolini's is offering a "49ers Special" on Sunday, which means they're taking \$4.90 off the price of any pizza, and there are no limits on the amount of toppings you can order. "Pizza is one of the biggest Super Bowl foods, and we want to be included because we offer the best pizza in town," owner David Odle said. D'Allesandro's Pizza is another local restaurant offering a Super Bowl special. When ordering online at www.dalspizza.com, use the coupon code "SUPERBOWL" to get \$1 off your order. Medium pizzas with up to 2 toppings are \$5.99 each when you buy two or more at Dominoes. You can visit

www.dominos.com to print out coupons to the store nearest you. You could win a free large pizza from Papa John's by calling the outcome of the Super Bowl coin toss by midnight Saturday. Visit www.papajohns.com for more information.

Use paper products

Super savings for Super Bowl Parties

Part of me wants to discourage using disposable tableware because I think it can be wasteful. At the same time, if you supply dishes to all your guests, you'll end up using quite a bit of water and time on cleanup. The best solution to this dilemma is to go for biodegradable and paper items instead of Styrofoam products, which can't be recycled. Check The Dollar Tree first. They typically carry paper plates, napkins and utensils for \$1 per package. At coupons.com, you can print out coupons for \$1 off Sparkle paper towels and Glad trash bags, so cleanup won't cost you as much.

Get group involved

If you're getting together with just your close friends, consider having a pot luck-style party. Ask your guests to bring a dish and a six-pack of beer or other drinks. If most of your friends have kids, plan to hire one or two baby-sitters and set up a supervised kids' area. It's a cheaper alternative to hiring individual sitters. Most importantly, remember to enjoy the game and kick back with your friends. Some party hosts get so wrapped up in the planning process they end up checking the ice and rearranging the snack table the entire time. Plan ahead and you'll be less likely to stress during the big game.

Email Abigail Darlington at Charlestonsavvyshopper@postandcourier.com Find more ways to save by liking our Facebook page and visiting the blog at charlestonsavvyshopper.com.

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6 **STELLAR CELEBRATION; The more fun, the more money Tradition continues at the 13th annual Naples Winter Wine Festival**

Naples Florida Weekly (Florida)

January 31, 2013

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Byline: ATHENA PONUSHIS aponushis@floridaweekly.com

Body

STELLAR CELEBRATION

THE STARS, INDEED, ALIGNED FOR fine wine and big money to come out in equal abundance at the 2013 Naples Winter Wine Festival. When all was sipped and done, the stellar festivities had raised a heavenly \$8.6 million.

Two o'clock Saturday afternoon and the millionaires converge on the lawn at The Ritz. They're in the heat of it now, guzzling and grappling over auction lots for trips to Paris, South Africa, the Kentucky Derby. They down their spirits and raise their paddles. They sip, they bid, they clap, they kiss. Oh! The money, the wine, the lots, the charity — they're so happy, they're spitting.

These trustees and guests of the Naples Winter Wine Festival are titans in the world of business and industry, men and women of utmost distinction and success. They are humanitarians, yes, but step into the big top on auction day and see that they are also wineimbibing brutes, vintage-guzzling gluttons, carousing in the depths of their philanthropy.

They sit under crystal chandeliers — real crystal in a tent! — snacking on **pretzel crisps**, sipping away their inhibitions. When wives act too reserved, husbands reach in: "Give me that paddle, I'll do it!" When husbands put the paddle down too soon, wives pick it up, smiling, ever coy. They circle other tables, lean in to other couples: "Do you want to go in on the Tuscan escape?" No one bats an eye. They're bidding, not sweating, the air conditioning pumped in so steadily that the women wear shawls 'til they feel the glow of their wine. Warmed up now, a feisty one pinches her sommelier on the rear. Ah, the revelry, they make it look so civilized.

Auctioneers work to move the egos in the crowd to their pockets: "Who's the most romantic man in the room?" A gentleman dressed in a dapper white suit raises a \$120,000 bid on a ninenight Italian holiday. "What a man!"

Another lot, another nudge: "Who's the best golfer in the room? You don't want to be sitting at home watching the Masters on TV, how anticlimactic."

Lot 16 incites a duel: VIP tickets to the Emmys, walk the red carpet, attend the HBO after party. The British auctioneer fans the fray: "How about \$110,000 to really piss her off? How about \$120,000 against you both? \$130,000 and you will make this grown man cry!"

Lot 47 brings more prodding: "Charlie Parker's cooking for you, for God's sake. How classy can you get?" Along with the meal, Billy Dean singing. "Holy cow! He's a sex symbol, you see ... \$250,000. Shall we leave it there, or shall we push for one more? Are you done, Madame? Are you sure?"

STELLAR CELEBRATION; The more fun, the more money Tradition continues at the 13th annual Naples Winter Wine Festival

These bidders are voracious. They swirl, they swig, they bid. They swirl, they swig, they bid. Their hands never idle. When they win, they dance. When they bid more than they intended — oh, never mind — on to the next!

As the gentry bid higher and higher, festival volunteers band around them, shaking noisemakers and tambourines. Their festival T-shirts tout the mantra for the commotion: "Bid high. Bid often. It's all for the kids!"

At the beginning of the day, some volunteers were taken aback: "\$130,000? That's a house!" But now that they've seen a Ferrari F12berlinetta go for \$750,000 nearly as fast as its engine accelerates, they're jaded when it comes to later lots: "\$340,000? That's all? Come on! You've got more than that."

The escalating brouhaha gives new meaning to the song lyrics that blare between the bids: Michael Jackson's disco boogie "Don't stop, don't stop 'til you get enough," now seems geared toward charity. The hot country hit "Here for the Party" lends to the double entendre of the fest. And then there's Katy Perry pleading, "Come on, show 'em what you're worth ..."

Public relations specialists reach for the calculators on their cell phones to tally up the money as it flies about. One hour in, \$1 million raised. Half an hour more, another million. By the end of the 13th annual Naples Winter Wine Festival, \$8.6 million has been collected on behalf of the underprivileged children of Collier County.

The more fun, the more money

Through the Naples Children & Education Foundation, the charitable arm of the wine festival, children suffering from untreated tooth decay have received dental care; those in need of eye glasses have gotten two pair, one for home, one for school; and those who are hungry have been given hot meals. So yes, the Naples Winter Wine Festival is all about the children — but it's also all about the status, that palpable beast in the room.

And don't forget the wine. It's as ample as the wealth, for these bidders, these donors, these festival trustees are a crowd fit for the chronicles of Tom Wolfe.

"I hate these people," one sommelier says to the laughter of his cohorts as he saunters back from pouring wine at his table. He notices a reporter's notebook nearby and feels the need to clarify. "No, I didn't mean that. It's just that these people are so remarkably generous, they can do things I will never be able to do in my whole life. And they do it so willingly and so graciously, I wish I had the opportunity."

"So it's not hate, it's jealousy. Total jealousy."

Just look at the generosity at table 24. There are 12 bottles of wine on the table when the lot called "Chateaux and Lights" comes up. Two couples will travel to Paris and Bordeaux in June with vintners Shahpar and Darioush Khaledi for six nights of wining and dining. Six bottles of the Darioush flagship wine Darius II are included in the lot. Dave and Pat Gibbons want that lot. Their friends Jim and Martha Fligg want to join them. The bidding begins.

Bids start at \$25,000 and quickly go up to \$50,000, up to \$80,000. Mr. Gibbons bides his time, then stands up tall to place his \$110,000 bid. The auctioneer acknowledges his assertive stance with, "Good afternoon, sir."

Some aspirant challenges the bid. Mr. Gibbons thinks of all the fun to be had in France, the tours and private tastings. He raises his paddle for \$130,000. The aspirant strikes again. Mr. Gibbons thinks of his 48th wedding anniversary coming up June 12 — in the midst of this trip. He raises his paddle for \$150,000. The aspirant paddles back.

Mr. Gibbons thinks of the children, the boy who spoke at the beginning of the auction about how he packs lunches for his nephews every day and if it were not for the wine fest, he would have no food to give them. Mr. Gibbons raises his paddle for \$170,000.

Shot down by the aspirant. Cameras are zooming in on Mr. Gibbons now. He practices no restraint, raising his paddle again and again, like he's in some championship ping-pong match.

STELLAR CELEBRATION; The more fun, the more money Tradition continues at the 13th annual Naples Winter Wine Festival

"Do you want it?" belts the auctioneer. Mrs. Gibbons bellows back, "Yes, we do!" Woo hoo! The Gibbonses and the Fliggs win the French excursion for \$220,000. They hug and kiss. Fellow bidders walk over to pat their backs in congratulations, pointing fingers at the winners as if to say, "You! You!"

Mr. Gibbons sighs in the afterglow of his triumph, then sits down to eat his short rib slider with Vidalia onion relish. He does not see the decadence, the rampant indulgence of the festival as too much. He looks at the effect, not the excess.

"What makes this so successful is that it's so much fun," he says. "The best chefs in the world, the best vintners in the world, ask us, 'Can we please be invited back again?' They turn down countless other invites to come here. They want to come here. They ask to come back here to Naples."

The more fun, the more money. The more chefs, the more vintners, the more bidders, the more the end result achieves what the festival trustees set out to do: Raise money to help the disadvantaged and at-risk kids of Collier County. That's how the obscenity of it all turns to charity. And all the pampering, all the extravagance, all the attentive wining and dining are perfectly paced to put the bidders in the mood.

Affecting our corner of the world

As trustees of NCEF and thereby the festival, Mr. and Mrs. Gibbons hosted a vintner dinner the Friday evening before the auction. Emeritus trustees Frank and Mary Pat Hussey stepped in as their co-hosts. In keeping with the theme of the 2013 festival, "When the Stars Align," the dinner was designed around the concept of "Stars in a Burgundy Sky," playing off the color, the wine and the region in France.

Guests arrived at dusk. As the doors to their limos opened, a French maiden, her shoulders bare in a peasant shirt, handed each woman a long-stemmed rose, "Bonsoir." Midway up the drive, a smiling man wearing a black beret and a red ascot played the accordion. Instructed to stay in character, he didn't say much more than "Merci, Madame et Monsieur," for if he got to chatting, he would hold the guests captive, "Back in my day ..."

Up the stairs, the guests were met by a photographer to have their picture taken in front of a green screen (unbeknownst to them at this point, at the end of the evening they would be presented a framed photograph with the backdrop of Morey Saint Denis melded in so it would look like they had actually traveled to the vineyard of the wine they were drinking).

"It's a catalyst," dinner guest Rusty Staub says of the opulence, the celebrity chefs and the vintner gods. "There's a lot of wealth here in Naples, and they made the decision they were going to take care of these kids ... If they aren't taking care of them, nobody is."

Wine Spectator has ranked the Naples Winter Wine Festival the most successful charity wine auction event in the nation since 2004. Mr. Staub says the wine and the food and the wealth are the draw. "People want to come and be a part of it."

A former major league ballplayer, Mr. Staub lives in West Palm Beach. Come January, he makes his way to the Gulf Coast in support of the wine fest; he has attended every one.

"You can't pull something out of the sky," he says to those concerned that the exorbitance of the event might be too much. "The wine festival is about people caring about those who have nothing, or almost less than nothing. They've made the decision, because they have so much, they're not going to let that happen to all of these kids. They're going to give these kids a chance."

"It's not changing the path of the earth, but it's changing the path of thousands of children here."

Setting the mood

STELLAR CELEBRATION; The more fun, the more money Tradition continues at the 13th annual Naples Winter Wine Festival

The Naples Winter Wine Festival might not be changing the course of the cosmos, but for her vintner dinner, Mrs. Gibbons hired lighting engineers to make it appear as if clouds were moving across the barrel-shaped ceiling — clouds cast in shades of burgundy, of course.

As her guests made their way out onto her lanai to dine, it looked as though a string trio was levitating above the spa of the swimming pool. The musicians were atop on a plate of Plexiglas. And those lighting engineers had turned the water into wine, as theatrical ingenuity had turned the pool into a sea of burgundy.

As they tucked into a sumptuous feast of Nantucket Bay scallops, seared foie gras and truffle-roasted pheasants, none of her guests could have fathomed how close the details came to coming together in time. But even in the disarray of the day before, when the scallops had not yet arrived and she still had to pick up her auction slacks from Saks, Mrs. Gibbons did not stress. She spoke of a trip she took to Immokalee.

Mrs. Gibbons went picking in the tomato fields, filling up a 32-pound bucket for a 50-cent ticket. She went there with NCEF to see the population and see the poverty the foundation hopes to dispel.

"There was a woman in the fields, she had been there since she was a teenager," she began. "When she heard I was an RN, she grinned at me and said, 'My daughter's an RN at the Mayo Clinic in Minnesota. Because of your group, she was able to go college and become an RN at the Mayo Clinic.' She was so proud. It was just beautiful. She told me, 'This (picking tomatoes in the fields) is in my blood, but thank God my kids won't have to do it.'"

Ay, there's the rub of the Naples Winter Wine Festival, the power it has to roll the world away.

French vintner Laurent Ponsot describes the festival this way: "It's kind of a parentheses in time. You're not really in the normal world when you're here."

The wine fest does, indeed, transcend the normal world. It can turn a Naples home into a French chateaux. Better yet, it can transcend the misfortunes of children by way of a soiree of millionaires, leaving no one to question the means of such wine-fueled philanthropy. :

Where the millions go

Wine fest weekend starts off every year with "Meet the Kids Day," when Naples Children & Education Foundation trustees and guests meet some of the youngsters who have benefited from programs and services made possible by festival proceeds over the years.

NCEF awards grants based on needs assessments that have shown major gaps in local children's services in the following critical areas: medical/dental care, vision care, early childhood education, out-of-school services, behavioral health and childhood hunger.

This year's "Meet the Kids Day" took place at the new Baker Field at the Boys & Girls Club of Collier County. More than 100 children and representatives from 29 nonprofit organizations were on hand. Baker Field is a state-of-the-art facility that provides underserved and at-risk youth and children with a safe place to play and participate in educational and character development programs designed by the Cal Ripken Sr. Foundation. All programming is funded by an NCEF grant.

Since the first Naples Winter Wine Fest in 2001, more than \$107 million has been allocated to these beneficiaries:

* ABLE Academy

* Boys & Girls Club of Collier County

* Cal Ripken Sr. Foundation

* Catholic Charities

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- * Child Care of Southwest Florida
- * Children's Home Society
- * Children's Hurricane Relief
- * Collier Child Care Resources
- * Collier County Child Advocacy Council / Child Protection Team
- * David Lawrence Center
- * Eden Florida Weekly ELLM Project
- * First Book of Collier County
- * Florida's Vision Quest
- * Friends of Foster Children of SWF
- * Fun Time Early Childhood Academy
- * Golisano Children's Hospital of SWF
- * Golisano Children's Museum of SWF
- * Guadalupe Center of Immokalee
- * Healthcare Network of SWF
- * Immokalee Child Care Center
- * Immokalee Housing & Family Services
- * Legal Aid for Collier Kids
- * Make-A-Wish Foundation
- * Marco "Eye-Land" Foundation
- * Marco Island YMCA
- * Naples Botanical Garden
- * Naples Equestrian Challenge
- * PACE Center for Girls
- * Redlands Christian Migrant Association
- * The Ricky King Children's Fund
- * Shelter for Abused Women & Children
- * Southwest Florida Workforce Development

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Board

- * St. Matthew's House / St. Matt's Camp for Kids
- * Tutor Corps
- * YMCA of the Palms
- * Youth Haven

Never ones to rest on their laurels, the NCEF grants committee is hard at work determining how to allocate this year's \$8.6 million. The recipients of grants for 2013 will be announced March 18. :

Through the years

- * \$116 million Amount raised by the Naples Winter Wine Festival since 2001
- * 36 Charities that have received grants from the Naples Children & Education Foundation, the festival's founding organization, since the first festival
- * 150,000 Number of underprivileged and at-risk children benefiting from festival proceeds since 2001
- * 38 percent Percentage of Collier County children served by the NCEF
- * No. 1 Festival's ranking as nation's top charity wine auction since 2004 by Wine Spectator magazine
- * 500 Guests under the auction tent in 2013
- * \$2 million Winning bid at 2007 festival for a Rolls-Royce Phantom Coupe and one of the highest bids ever for a single lot at a charity wine auction worldwide
- * \$8,500 Cost for one couple to attend the festival
- * \$20,000 Cost for two couples to attend the festival and the same Friday evening vintner dinner in a private home
- * 100-by-148 feet Size of the tent at The Ritz-Carlton Golf Resort for the live auction and the Sunday celebration brunch
- * 2,500 Wine glasses on hand for Saturday's auction, wine tasting and culinary showcase
- * 420 Number of volunteers who help prepare for the gala and were involved during the festivities, serving as wine stewards, greeters, auction spotters, etc.

Top auction lots

La Dolce Vita at 200mph+

\$750,000 for the fastest, most powerful Ferrari ever made, the 2013 F12berlinetta.

Chicago, My Kind of Band

\$405,000 for a private concert in Naples by the band Chicago, including dinner and fine wines.

A Hottie Maserati

\$340,000 for a 2014 Maserati Quattroporte V8, the fastest four-door Maserati and one of the first to be delivered in the U.S.

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You Cannes & You Will

\$280,000 for a trip for four to the 2013 Cannes Film Festival, followed by a week at La Grange, a 17th century farmhouse on a private estate in Provence.

So Close, Yet Safari Away

\$280,000 for a South Africa experience for two couples for 13 nights, with a \$100,000 Graff jewelry credit.

Lunch Boxes of Love

\$244,500 in on-the-spot donations for the Lunch Boxes of Love fund-a-need lot that will provide meals for thousands of hungry children and their families in Collier County.

Wheels Up, Wings Wide

\$240,000 for a 22-day, around-the-world trip for one couple on a luxury jet designed for 50 passengers traveling to exotic locales such as Panama, Easter Island, Fiji and Bali.

Chateaux & Lights

\$220,000 for a trip to Paris and Bordeaux with private dinners and tastings with world-renowned vintners led by Dariush vineyards proprietors Shahpar and Dariush Khaledi. Includes six bottles of Dariush's flagship wine, Darius II.

C'est Magnifique

\$220,000 for a four-night Parisian trip for eight women, with private visits to several legendary fashion houses.

Triple Treat

\$200,000 for a nine-night escape for four couples to three of Aman Resorts' premier North American properties.

United Artists

\$180,000 for the top wine lot, a rare 65-bottle complete vertical of Chateau Mouton Rothschild Artist Label series housed in a display table custommade by Thomas Riley Artisans Guild.

Instant Vintner

\$180,000 for ownership of 2.5 acres of O. Fournier vineyard property in Argentina and a sixnight Argentine escape for two.

Whisky, Golf & Heritage

\$150,000 for a four-night trip to Scotland for eight men, with accommodations at a 17th century Scottish Neoclassical mansion, complete with hunting and fishing on property, golf and more.

The Triple Crown of Racing & Wine

\$130,000 for a 5-liter bottle of each of V)rit)'s three, 100-point wines from 2007, along with VIP access to the Kentucky Derby, the Preakness and the Belmont Stakes.

\$130,000 for the keys to vintner Cliff Lede's estate and Porsche for a one-month Napa Valley immersion inclusive of a horizontal of 2009 Poetry Cab. :

STELLAR CELEBRATION; The more fun, the more money Tradition continues at the 13th annual Naples Winter Wine Festival

Graphic

MARISA LANE / COURTESY PHOTO Guests mingle at the vintner dinner at the home of Pat and Dave Gibbons. STEPHEN WRIGHT/ FLORIDA WEEKLY The Lunch Boxes of Love mascot gets a big hug on Meet the Kids Day. STEPHEN WRIGHT / FLORIDA WEEKLY ABOVE: Laurent Ponsot at the Friday dinner at the home of Pat and Dave Gibbons. LEFT: Frank Reda greeted guests at the Gibbonses'. STEPHEN WRIGHT/ FLORIDA WEEKLY Laura and Matt Brabinski with Lola and Leo at Meet the Kids Day, for the Golisano Children's Hospital of Southwest Florida. Martha and Jim Fligg celebrate their winning bid on a lot titled "You Cannes & You Will," a package for two couples that includes three nights at the 2013 Cannes Film Festival followed by a week at a 17th century farmhouse in Provence. MILA BRIDGER / COURTESY PHOTO Plating up for 29 guests at the Gibbonses'. STEPHEN WRIGHT / FLORIDA WEEKLY Meredith Gibbons eyes the Graff Diamonds display that was part of an auction lot. STEPHEN WRIGHT/ FLORIDA WEEKLY

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Whole Planet Foundation and Partners to Host (Unofficial) Pre-Grammy Benefit at Historic East West Studios

India Retail News

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Body

New Delhi, Jan. 29 -- On Wednesday, February 6, 2013, Whole Planet Foundation, Whole Foods Market West Hollywood, presenting sponsor Sambazon and other valued partners will honor Bonnie Raitt, Daryl Hannah, Jack Johnson, Jessica Alba and Jason Mraz for their commitment to promoting sustainable practices and changing global environments. The celebration will take place at Whole Planet Foundation's inaugural pre-GRAMMY benefit, which will be held at the historic East West Studios in Hollywood.

GRAMMY winners Ozomatli and leading artists including Meiko and Stephen Perkins of Jane's Addiction will perform at the benefit, which will also feature celebrity presenter Ed Begley, Jr., emcee Geno Mitchellini and more.

The event coincides with Whole Planet Foundation's annual fundraising campaign. Proceeds from the evening will go directly to the foundation to support its efforts to alleviate global poverty through microcredit and entrepreneurship programs in 55 countries around the world, including the United States.

"We are honored to celebrate these amazing leaders who share our commitment to making the world a better place and are inspiring others to get involved," said Joy Stoddard, executive development and outreach director of Whole Planet Foundation. "And with the launch of our annual fundraising campaign on February 20, 2013, the timing of this event couldn't be more perfect. Hosting a benefit event during such a high-profile music week is a great opportunity to raise awareness about how by donating small change, shoppers can make a big difference for poor entrepreneurs around the world."

Whole Planet Foundation will honor recipients of the Whole Planet Foundation Vanguard awards: Bonnie Raitt and Daryl Hannah who have been cultural icons and life-long activists in promoting sustainable practices. The foundation will also recognize the recipients of the Whole Planet Foundation Trailblazer awards Jack Johnson, Jessica Alba and Jason Mraz who have been proactive leaders in the changing global environments.

The event will be held in historic East West Studios. Recently updated by renowned designer Philippe Starck, this venue is where legendary artists including Frank Sinatra, Barbara Streisand, The Rolling Stones, The Beach Boys and many others have recorded their iconic hits.

"As entrepreneurs operating under the Triple Bottom Line philosophy, measuring our success economically, socially and environmentally has always been the foundation for everything we do," said Ryan Black, Sambazon co-founder and chief executive officer. "We deliver on this mission through our partnership with over 10,000 independent family farmers and bio-diversity protection efforts in the Brazilian Amazon, which is why we're so stoked to align with Whole Planet Foundation and its purpose."

Whole Planet Foundation and Partners to Host (Unofficial) Pre-Grammy Benefit at Historic East West Studios

The event is also sponsored by Whole Foods Market West Hollywood, Chivas Regal and Gibson Pro Audio brands Cerwin Vega and Stanton, and is produced by Planet LA Music and Clamorhouse. The event will feature innovative cross-promotional efforts between the Whole Planet Foundation, Whole Foods Market, artists, brand partners and technology platforms including Talenthouse, Thrillcall and Viddy apps. In addition, brand partners including Sambazon, popchips, KIND Healthy Snacks and others are launching cross-promotional campaigns to raise awareness for the benefit and their continuing support of Whole Planet Foundation.

Event partners include Hubert's Lemonade, Tito's Vodka, popchips, KIND Healthy Snacks, VOSS Water, Ciao Bella Gelato Co., Stone Brewing Company, Uber Cars and Wild Soul. Other supporters include Essentia, Hand in Hand Soap, Hint, Justin's, Late July Organic, PACT, **Pretzel Crisps**, Reason, The Republic of Tea, Steaz, Tasty Brand, VOS, World Centric, Zevia and others.

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Global Snack Foods Industry

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Body

Reportlinker.com announces that a new market research report is available in its catalogue:

Global Snack Foods Industry

http://www.reportlinker.com/p097840/Global-Snack-Foods-Industry.html#utm_source=prnewswire&utm_medium=pr&utm_campaign=Snack_and_Sweet

The global outlook series on the Snack Foods Industry provides a collection of statistical anecdotes, market briefs, and concise summaries of research findings. Illustrated with 37 fact-rich market data tables, the report offers a rudimentary overview of the industry, and highlights latest trends and demand drivers. Regional markets briefly abstracted and covered include United States, Canada, Japan, Europe (France, Germany, United Kingdom, Spain, and Poland), Asia Pacific (China, India, Indonesia, South Korea and Taiwan) and Latin America (Mexico). The report offers a compilation of recent mergers, acquisitions, and strategic corporate developments. Also included is an indexed, easy-to-refer, fact-finder directory listing the addresses, and contact details of 251 companies worldwide.

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GLOBAL DIRECTORY

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Snyder's-Lance, Inc. to Release Fourth Quarter 2012 Results on Tuesday, February 12th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, February 12th.

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Body

Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that it intends to release its 2012 fourth quarter results before the market opens on Tuesday, February 12, 2013. Management will also conduct a conference call and live webcast at 9:00 am Eastern Time on Tuesday, February 12, 2013 to review the Company's results. Participating in the conference call will be Dave Singer, Chief Executive Officer, Carl Lee, Jr., President and Chief Operating Officer, Rick Puckett, Executive Vice President and Chief Financial Officer and Mark Carter, Vice President and Investor Relations Officer.

(Logo:<http://photos.prnewswire.com/prnh/20110411/CL80943LOGO>)

The conference call and accompanying slide presentation will be webcast live through the Investor Relations section of the Company's website,<http://www.snyderslance.com>. In addition, the slide presentation will be available to download and print approximately 30 minutes before the webcast at <http://www.snyderslance.com>.

To participate in the conference call, the dial-in number is (866) 814-7293 for U.S. callers or (702) 696-4943 for international callers. A continuous telephone replay of the call will be available between 1:00pm on February 12 and midnight on February 19. The replay telephone number is (855) 859-2056 for U.S. callers or (404) 537-3406 for international callers. The replay access code is 93605983. Investors may also access a web-based replay of the conference call at<http://www.snyderslance.com>.

About Snyder's-Lance, Inc.

Snyder's-Lance, Inc., headquartered in Charlotte, NC, manufactures and markets snack foods throughout the United States and internationally. The Company's products include pretzels, sandwich crackers, pretzel crackers, potato chips, cookies, tortilla chips, restaurant style crackers, nuts and other snacks. Snyder's-Lance has manufacturing facilities in North Carolina, Pennsylvania, Iowa, Indiana, Georgia, Arizona, Massachusetts, Florida, Ohio and Ontario, Canada. Products are sold under the Snyder's of Hanover®, Lance®, Cape Cod®, Pretzel Crisps®, Krunchers!®, Tom's®, Archway®, Jays®, Stella D'oro®, O-Ke-Doke® and Grande® brand names along with a number of private label and third party brands. Products are distributed nationally through grocery and mass merchandisers, convenience stores, club stores, food service outlets and other channels. LNCE-G

SOURCE Snyder's-Lance, Inc.

CONTACT: Mark Carter, VP and Investor Relations Officer, +1-704-557-8386; Joe Calabrese, Financial Relations Board, +1-212-827-3772

Snyder's-Lance, Inc. to Release Fourth Quarter 2012 Results on Tuesday, February 12th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am East....

Load-Date: January 25, 2013

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Snyder's-Lance, Inc. to Release Fourth Quarter 2012 Results on Tuesday, February 12th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am Eastern on Tuesday, February 12th.

Benzinga.com

January 24, 2013

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Length: 409 words

Body

Byline: Newswire

CHARLOTTE, N.C., Jan. 24, 2013 /PRNewswire/ -- Snyder's-Lance, Inc. (Nasdaq-GS: LNCE) announced today that it intends to release its 2012 fourth quarter results before the market opens on Tuesday, February 12, 2013. Management will also conduct a conference call and live webcast at 9:00 am Eastern Time on Tuesday, February 12, 2013 to review the Company's results. Participating in the conference call will be Dave Singer, Chief Executive Officer, Carl Lee, Jr., President and Chief Operating Officer, Rick Puckett, Executive Vice President and Chief Financial Officer and Mark Carter, Vice President and Investor Relations Officer.

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SOURCE Snyder's-Lance, Inc.

[Graphic omitted]

Snyder's-Lance, Inc. to Release Fourth Quarter 2012 Results on Tuesday, February 12th Before Market Opens. Will Host Conference Call and Webcast at 9:00 am East....

Load-Date: January 26, 2013

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Spice Up Your Big Game Party with Cabot Creamery's Bold and Tasty 'Superb Bowl' Recipes

3BL Blogs

January 22, 2013 Tuesday 9:15 PM EST

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Length: 1644 words

Body

Jan 22, 2013 (3BL Blogs:<http://3blmedia.com/> Delivered by Newstex)

'Get Pinning to Win!' for The Big Game with Cabot Cheese and Pinterest

SOURCE: Cabot Creamery Cooperative[1]

DESCRIPTION: CABOT, VT, January 22, 2013 /3BL Media/ - With the biggest sporting event of the year less than two weeks away, now is the time to start thinking about your big game party. On February 3rd, San Francisco will battle Baltimore in The Big Easy for the most coveted trophy in American sports. And adding to the drama, this is the first time ever that brothers will coach two rival teams, hailing from almost exact opposite locations along their respective coasts. This year's game is sure to be anything but ordinary, and Cabot Creamery Cooperative - best known as the makers of the 'World's Best Cheddar' - wants to make sure your big game party is nothing short of superb.

'Last year, an estimated 111 million people watched the game,' says Candace Karu, Cabot's Lifestyle Commentator and Favorite Foodie[2]. 'Of course, that translates to a lot of big game parties, and while everyone loves watching the game, we all know the real attraction is the food. To help separate your party from the pack this year, Cabot is showcasing nearly two-dozen bold and tasty Superb Bowl recipes[3], which feature our award winning cheddars and Greek-Style Yogurt.'

Cabot snacks, like Hot as a Torch! Jalapeno Poppers[4], BBQ Yogurt Dip[5], Touchdown Dip[6], and Badass Nachos[7], are sure to bring more excitement to the party than any touchdown pass. 'Just remember to keep the food near the TV,' advises Candace, 'you wouldn't want your guests to miss the game!'

To add to the fun, Cabot wants fans to 'Get Pinning to Win!'^[8] They can keep their friends and family in the know by sharing slammin' Cabot Superb Bowl recipes on Pinterest. By pinning one of the four recipes above on Pinterest, they'll be entered to win Cabot products, so they can keep snacking in style long after the big game. They'll be entered to win Cabot prizes (60 winners total) for each recipe they pin. And, they can keep coming back and pinning more recipes for more chances to win, up to four entries per person. Prizes include:

- Grand Prize: \$75 Cabot Gift Box, plus a second \$75 Cabot Gift Box sent to a friend
- Nine more pinners will receive a \$75 Cabot Gift Box
- 50 pinners will receive a Cabot coupon for FREE cheese

More details and the complete contest rules are available at: [http://www.cabotcheese.coop/pages/pinterest-recipe-contest/\[9\]](http://www.cabotcheese.coop/pages/pinterest-recipe-contest/[9])

Hot as a Torch! Jalapeno Poppers[10]

Makes 24

Ingredients:

12 jalapeno peppers, about 2 1/2 inches long 4 ounces Cabot Mild[11] Lactose-Free Cheddar or Sharp Cheddar[12]*, grated (about 1 cup) 3 ounces cream cheese 1/4 teaspoon garlic powder 1/4 teaspoon ground chipotle pepper 2 large eggs 2/3 cup unflavored dry bread crumbs 1/2 teaspoon salt Cabot Regular Sour Cream[13]

Spice Up Your Big Game Party with Cabot Creamery's Bold and Tasty 'Superb Bowl' Recipes

Directions:

1. Preheat oven to 325°F. Lightly oil baking sheet and set aside.
2. Cut peppers in half lengthwise; scrape out and discard seeds.
3. In small bowl, mix together cheddar, cream cheese, garlic powder and chipotle pepper; fill each pepper half with some of mixture.
4. In one bowl, lightly beat eggs until combined and frothy. In another bowl, stir together bread crumbs and salt. Roll each filled pepper in egg, then in bread crumbs. Place on baking sheet.
5. Bake until tender and browned, about 30 minutes. Serve warm, with sour cream for dipping.

*Or use a spicy flavor, such as Cabot Chipotle Cheddar[14] or Cabot Habanero Cheddar[15], omitting ground chipotle pepper.

BBQ Yogurt Dip[16]

Makes about 2 cups for 8 appetizer servings

Ingredients:

1 cup Cabot 2% Plain Greek-Style[17] Yogurt 1 (8-ounce) package Cabot Vermont Premium Cream Cheese[18], softened 1-2 green onions, finely chopped 1 teaspoon lemon juice 1 teaspoon salt 1 teaspoon ground black pepper 1 teaspoon ground cumin 1 teaspoon chili powder 1 teaspoon mild paprika 1/2 teaspoon ground red pepper (cayenne) 1 tablespoon favorite BBQ sauce

Directions:

1. Mix together yogurt, cream cheese, green onions, lemon juice, salt, pepper and other spices (except BBQ sauce) until well blended
2. Pack into small bowl or mold, cover and refrigerate for at least 4 hours or until firm.
3. Serve in bowl or unmold onto plate. Spoon stripe of BBQ sauce across top for garnish.

Try with our Football Cheddar Crackers[19].

Touchdown Dip[20]

Makes about 2 cups

Ingredients:

1 tablespoon Cabot Salted Butter[21] 1 tablespoon King Arthur[22] Unbleached All-Purpose Flour 3/4 cup mild, medium or hot tomato salsa 1/4 cup Cabot Regular Sour Cream[23] 8 ounces Cabot Sharp Cheddar[24], grated (about 2 cups) Classic or Supreme flavored **Pretzel Crisps**[25], tortilla chips Carrot and celery sticks

Directions:

1. In a saucepan over medium heat, melt butter. Add flour and stir for about 30 seconds to cook flour.
2. Stir in salsa and cook, stirring, until mixture is simmering. Stir in sour cream.
3. Add cheese and continue stirring until cheese is completely melted and mixture returns to simmer.
4. Transfer to bowl and serve hot, surrounded with chips and veggies.

Badass Nachos[26]

Makes 6 servings

Ingredients:

1 pound ground beef (10% fat) 1 (15-ounce) container Mild, Medium or Hot Wholly Salsa[27] 1 (6-ounce) bag Food Should Taste Good [28]Yellow Corn or Blue Corn Tortilla Chips 1 (7-ounce) package Classic or Spicy Wholly Guacamole[29] 1 (2.25-ounce) can sliced black olives, well drained 8 ounces Cabot Sharp Cheddar[30], Chipotle Cheddar[31] or Habanero Cheddar[32], grated (about 2 cups)

Directions:

Spice Up Your Big Game Party with Cabot Creamery's Bold amp; Tasty 'Superb Bowl' Recipes

1. In large skillet over medium-high heat, cook ground beef, breaking it up with spoon, until juices have evaporated. Continue cooking for several minutes longer, scraping bottom of skillet, until meat is slightly browned and crispy.
2. Add salsa and let mixture simmer until juices have again evaporated. Remove from heat.
3. Preheat broiler. Arrange half of tortilla chips in single layer on large baking sheet. Top with half of beef mixture. Add half of guacamole in small spoonfuls, followed by half of black olives. Top with half of grated cheese.
4. Place under broiler for a minute or two until cheese is melted.
5. Make second batch with remaining ingredients.

NOTE TO EDITORS

For hi-res photos of the recipes above, visit: [https://cabot.imagerelay.com/sb/951aa98a-3e23-47ff-b36a-3733ba46a083\[33\]](https://cabot.imagerelay.com/sb/951aa98a-3e23-47ff-b36a-3733ba46a083[33])

ABOUT CABOT CREAMERY COOPERATIVE

Cabot Creamery Cooperative[34] has been in continuous operation in Vermont since 1919, and makes a full line of cheeses, yogurt, sour cream, cottage cheese and butter. Widely known as makers of 'The World's Best Cheddar,' Cabot is owned by the 1200 dairy farm families of Agri-Mark, the Northeast's premier dairy cooperative, with farms located throughout New England and upstate New York. For more information on Cabot, visit: [http://www.cabotcheese.coop\[35\]](http://www.cabotcheese.coop[35])

Cabot Creamery Cooperative is the world's first cheese maker and dairy cooperative to achieve B Corporation Certification[36], a validation of its attention to environmental and social impacts on stakeholders.

Tweet me: 'Get Pinning to Win!' for The Big Game with @CabotCoop [http://3bl.me/ys62nd\[37\]](http://3bl.me/ys62nd[37])

Contact Info: Bob Schiers Cabot Creamery +1 (888) 214-9444 [bschiers@cabotcheese.coop\[38\]](mailto:bschiers@cabotcheese.coop[38])

KEYWORDS: Food amp; Farming, Media and Communications, Social Media, pinterest, big game, football, Cabot, Cabot Creamery

- [1]: <http://3blmedia.com/cabotcheese> [2]: <https://twitter.com/candacekaru> [3]:
<http://www.cabotcheese.coop/pages/recipes/list-recipes.php?catID=96> [4]:
<http://www.cabotcheese.coop/pages/recipes/recipe.php?id=75> [5]:
<http://www.cabotcheese.coop/pages/recipes/recipe.php?id=769> [6]:
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<http://www.kingarthurflour.com/> [23]:
http://www.cabotcheese.coop/pages/our_products/product.php?catID=45&id=486 [24]:
http://www.cabotcheese.coop/pages/our_products/product.php?catID=37&id=3 [25]:
<http://pretzelcrisps.com/flavors/> [26]: <http://www.cabotcheese.coop/pages/recipes/recipe.php?id=590> [27]:
<http://eatwholly.com/> [28]: <http://www.foodshouldtastegood.com/#/home/> [29]: <http://eatwholly.com/> [30]: http://www.cabotcheese.coop/pages/our_products/product.php?catID=37&id=3 [31]:
http://www.cabotcheese.coop/pages/our_products/product.php?catID=5&id=44 [32]:
http://www.cabotcheese.coop/pages/our_products/product.php?catID=5&id=23 [33]:

Spice Up Your Big Game Party with Cabot Creamery's Bold amp; Tasty 'Superb Bowl' Recipes

<https://cabot.imagerelay.com/sb/951aa98a-3e23-47ff-b36a-3733ba46a083> [34]:

<http://www.cabotcheese.coop/> [35]:

<http://www.cabotcheese.coop/> [36]:

<http://bcorporation.net/community/directory/cabot> [37]:

<https://twitter.com/share?text=%E2%80%98Get+Pinning+to+Win%21%E2%80%99+for+The+Big+Game+with+%40CabotCoop+http%3A%2F%2F3bl.me%2Fys62nd+> [38]: bschiers@cabotcheese.coop

Load-Date: March 4, 2013

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Spice Up Your Big Game Party With Cabot® Creamery's Bold & Tasty 'Superb Bowl' Recipes; 'Get Pinning to Win!' for The Big Game with Cabot Cheese and Pinterest

PR Newswire

January 22, 2013 Tuesday 10:13 AM EST

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Length: 1105 words

Dateline: CABOT, Vt., Jan. 22, 2013

Body

With the biggest sporting event of the year less than two weeks away, now is the time to start thinking about your big game party. On February 3rd, San Francisco will battle Baltimore in The Big Easy for the most coveted trophy in American sports. And adding to the drama, this is the first time ever that brothers will coach two rival teams, hailing from almost exact opposite locations along their respective coasts. This year's game is sure to be anything but ordinary, and Cabot Creamery Cooperative -- best known as the makers of the "World's Best Cheddar" -- wants to make sure your big game party is nothing short of superb.

(Logo:<http://photos.prnewswire.com/prnh/20120213/MM52737LOGO>)

"Last year, an estimated 111 million people watched the game," says Candace Karu, Cabot's Lifestyle Commentator and Favorite Foodie. "Of course, that translates to a lot of big game parties, and while everyone loves watching the game, we all know the real attraction is the food. To help separate your party from the pack this year, Cabot is showcasing nearly two-dozen bold and tasty Superb Bowl recipes, which feature our award winning cheddars and Greek-Style Yogurt."

Cabot snacks, like Hot as a Torch! Jalapeno Poppers, BBQ Yogurt Dip, Touchdown Dip, and Badass Nachos, are sure to bring more excitement to the party than any touchdown pass. "Just remember to keep the food near the TV," advises Candace, "you wouldn't want your guests to miss the game!"

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Grand Prize: \$75 Cabot Gift Box, plus a second \$75 Cabot Gift Box sent to a friend. Nine more pinners will receive a \$75 Cabot Gift Box. 50 pinners will receive a Cabot coupon for FREE cheese.

More details and the complete contest rules are available at: <http://www.cabotcheese.coop/pages/pinterest-recipe-contest/>

Hot as a Torch! Jalapeno Poppers

Makes 24

Ingredients:

12 jalapeno peppers, about 2 1/2 inches long

Spice Up Your Big Game Party With Cabot® Creamery's Bold & Tasty 'Superb Bowl' Recipes; 'Get Pinning to Win!' for The Big Game with Cabot Cheese and Pinterest

4 ounces Cabot Mild Lactose-Free Cheddar or Sharp Cheddar*, grated (about 1 cup)

3 ounces cream cheese

1/4 teaspoon garlic powder

1/4 teaspoon ground chipotle pepper

2 large eggs

2/3 cup unflavored dry bread crumbs

1/2 teaspoon salt

Cabot Regular Sour Cream

Directions:

1. Preheat oven to 325°F. Lightly oil baking sheet and set aside.

2. Cut peppers in half lengthwise; scrape out and discard seeds.

3. In small bowl, mix together cheddar, cream cheese, garlic powder and chipotle pepper; fill each pepper half with some of mixture.

4. In one bowl, lightly beat eggs until combined and frothy. In another bowl, stir together bread crumbs and salt. Roll each filled pepper in egg, then in bread crumbs. Place on baking sheet.

5. Bake until tender and browned, about 30 minutes. Serve warm, with sour cream for dipping.

*Or use a spicy flavor, such as Cabot Chipotle Cheddar or Cabot Habanero Cheddar, omitting ground chipotle pepper.

BBQ Yogurt Dip

Makes about 2 cups for 8 appetizer servings

Ingredients:

1 cup Cabot 2% Plain Greek-Style Yogurt

1 (8-ounce) package Cabot Vermont Premium Cream Cheese, softened

1-2 green onions, finely chopped

1 teaspoon lemon juice

1 teaspoon salt

1 teaspoon ground black pepper

1 teaspoon ground cumin

1 teaspoon chili powder

1 teaspoon mild paprika

1/2 teaspoon ground red pepper (cayenne)

1 tablespoon favorite BBQ sauce

Directions:

1. Mix together yogurt, cream cheese, green onions, lemon juice, salt, pepper and other spices (except BBQ sauce) until well blended

2. Pack into small bowl or mold, cover and refrigerate for at least 4 hours or until firm.

3. Serve in bowl or unmold onto plate. Spoon stripe of BBQ sauce across top for garnish.

Try with our Football Cheddar Crackers.

Touchdown Dip

Spice Up Your Big Game Party With Cabot® Creamery's Bold & Tasty 'Superb Bowl' Recipes; 'Get Pinning to Win!' for The Big Game with Cabot Cheese and Pinterest

Makes about 2 cups

Ingredients:

1 tablespoon Cabot Salted Butter
1 tablespoon King Arthur Unbleached All-Purpose Flour
3/4 cup mild, medium or hot tomato salsa
1/4 cup Cabot Regular Sour Cream
8 ounces Cabot Sharp Cheddar, grated (about 2 cups)

Classic or Supreme flavored **Pretzel Crisps**, tortilla chips

Carrot and celery sticks

Directions:

1. In a saucepan over medium heat, melt butter. Add flour and stir for about 30 seconds to cook flour.
2. Stir in salsa and cook, stirring, until mixture is simmering. Stir in sour cream.
3. Add cheese and continue stirring until cheese is completely melted and mixture returns to simmer.
4. Transfer to bowl and serve hot, surrounded with chips and veggies.

Badass Nachos

Makes 6 servings

Ingredients:

1 pound ground beef (10% fat)
1 (15-ounce) container Mild, Medium or Hot Wholly Salsa
1 (6-ounce) bag Food Should Taste Good Yellow Corn or Blue Corn Tortilla Chips
1 (7-ounce) package Classic or Spicy Wholly Guacamole
1 (2.25-ounce) can sliced black olives, well drained
8 ounces Cabot Sharp Cheddar, Chipotle Cheddar or Habanero Cheddar, grated (about 2 cups)

Directions:

1. In large skillet over medium-high heat, cook ground beef, breaking it up with spoon, until juices have evaporated. Continue cooking for several minutes longer, scraping bottom of skillet, until meat is slightly browned and crispy.
2. Add salsa and let mixture simmer until juices have again evaporated. Remove from heat.
3. Preheat broiler. Arrange half of tortilla chips in single layer on large baking sheet. Top with half of beef mixture. Add half of guacamole in small spoonfuls, followed by half of black olives. Top with half of grated cheese.
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Contact: Bob Schiers
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SOURCE Cabot Creamery Cooperative

Load-Date: January 23, 2013

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